



El Dorado County

Master Report

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Placerville, California
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File Number: 06-1487

File ID: 06-1487

Type: Agenda Item

Status: Clerk's Inbox

Version: 1

Reference:

In Control: Board Of Supervisors

Created: 09/07/2006

Agenda Title: Learning Tree International USA

Final Action:

Title: Information Technologies Department recommending Chairman be authorized to sign Agreement #242-S0711 with Learning Tree International USA to provide on-site technical training classes entitled "Project Management: Skills for Success" for County Project Managers.

RECOMMENDED ACTION: Approve

FUNDING: General Fund

Notes:

Code Sections:

Agenda Date: 09/19/2006

Sponsors:

Agenda Number:

Enactment Date:

Attachments: Blue Route- Learning Tree.pdf ,Agreement # 242-S0711.PDF

Enactment Number:

Same:

Hearing Date: 09/19/2006

Contact: becky.stiles@edcgov.us

Next Meeting Date:

Approval History

Version	Date	Approver	Action
1	09/07/2006	Steve Featherston	Approved
1	09/07/2006	Jacqueline Nilius	Approved
1	09/07/2006	Agenda Coordinator	Delegate
1	09/08/2006	Kelly Webb	Approved
Notes	Consent; Reviewed and approved by County Counsel and Risk Management. Blue Route attached.		
1	09/13/2006	Laura Gill	Approved
Notes	Recommend approval.		

History of Legislative File

Ver- sion:	Acting Body:	Date:	Action:	Sent To:	Due Date:	Return Date:	Result:
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Text of Legislative File 06-1487

Information Technologies Department recommending Chairman be authorized to sign Agreement #242-S0711 with Learning Tree International USA to provide on-site technical training classes entitled "Project Management: Skills for Success" for County Project Managers.

RECOMMENDED ACTION: Approve

FUNDING: General Fund

Background: In July 2005, your Board adopted Policy B-13 "Contract Administration for Special Projects" which sets forth the duties and responsibilities of the officer or employee charged with the successful completion of the special project. In order for these employees to be successful, training must be provided.

Reason for Recommendation: These Project Management classes are the second and third classes to be held on-site to fill the need of training our county "Project Managers".
Course 267y- Project Management: Skills for Success - 2-Day Class. County anticipates 24 persons to attend this class, with a cost of \$15,560
Course 296- Project Management Skills for Success - 4-Day Class. County anticipates 24 persons to attend this class, with a cost of \$ 23,790

Fiscal Impact/Change to Net County Cost: Funding is included in the 06/07 Budget

Action to be taken following Board approval: Authorize Purchasing Agent to encumber funds for both classes with a not-to-exceed amount of \$39,350.



06-140'

Contract #: 242-S0711

CONTRACT ROUTING SHEET

Date Prepared: _____

Need Date: Need by 9/11/06
Thank-you.

PROCESSING DEPARTMENT:

Department: CAO/Proc. & Contracts
Dept. Contact: Pam Carlone
Phone #: 5833
Department: _____
Head Signature: Bonnie H. Rich
Bonnie H. Rich

CONTRACTOR:

Name: Learning Tree
Address: 1805 Library Street
Reston, A 20190-5630
Phone: (800) 789-4200

EL DORADO COUNTY COUNSEL
General Delaney
06 SEP - 5 AM 11:3

CONTRACTING DEPARTMENT: Information Technologies

Service Requested: Onsite technical training - 2 classes
Contract Term: 1 year Contract Value: \$39,380.00
Compliance with Human Resources requirements? Yes: _____ No: 3
Compliance verified by: _____

COUNTY COUNSEL: (Must approve all contracts and MOU's)

Approved: _____ Disapproved: _____ Date: 9-6-06 By: [Signature]
Approved: _____ Disapproved: _____ Date: _____ By: _____

ASSIGNMENT
DATE: 9-6-06
ATTORNEY: [Signature]
DEPT INDEX NO: 0526100
BY: [Signature]

PLEASE FORWARD TO RISK MANAGEMENT. THANKS!

RISK MANAGEMENT (All contracts and MOU's except boilerplate grant funding agreements)

Approved: [Signature] Disapproved: _____ Date: 9/7/06 By: [Signature]
Approved: _____ Disapproved: _____ Date: _____ By: _____

SEP 07 2006

OTHER APPROVAL: (Specify department(s) participating or directly affected by this contract).

Departments: _____
Approved: _____ Disapproved: _____ Date: _____ By: _____
Approved: _____ Disapproved: _____ Date: _____ By: _____

ORIGINAL

AGREEMENT FOR SERVICES #242-S0711

THIS AGREEMENT made and entered by and between the County of El Dorado, a political subdivision of the State of California (hereinafter referred to as "County") and Learning Tree International USA, Inc., a Delaware Corporation, duly qualified to conduct business in the State of California, whose principal place of business is 400 N. Continental Boulevard, Suite 200, El Segundo, CA 90245, (Mailing: 1805 Library Street, Reston, VA 20190-5630); (hereinafter referred to as "Contractor");

WITNESSETH

WHEREAS, County has determined that it is necessary to obtain a Contractor to provide on-site technical training classes entitled "Project Management: Skills for Success" for the Information Technologies Department.

WHEREAS, Contractor has represented to County that it is specially trained, experienced, expert and competent to perform the special services required hereunder and County has determined to rely upon such representations; and

WHEREAS, it is the intent of the parties hereto that such services be in conformity with all applicable federal, state and local laws; and

WHEREAS, County has determined that the provision of these services provided by Contractor is in the public's best interest, and that these services are more economically and feasibly performed by outside independent Contractors as well as authorized by El Dorado County Charter, Section 210 (b) (6) and/or Government Code 31000;

NOW, THEREFORE, County and Contractor mutually agree as follows:

ARTICLE I

Scope of Services: Contractor agrees to furnish personnel, materials and services necessary to conduct the following training courses:

Course 267Y – Project Management: Skills for Success – 2 Days
(\$9,125.00 + additional 13 students @ \$495/each + 1 student free of charge) \$15,560.00

Course 296 – Project Management Skills for Success – 4 Days
(\$14,270 + additional 14 students @ \$680/each)

\$23,790.00

County anticipates approximately 24 individuals attending the training sessions from various departments throughout the County. Training courses shall be in accordance with Exhibit “A”, incorporated herein and made by reference a part hereof.

ARTICLE II

Term: This Agreement shall become effective when fully executed by both parties hereto and shall expire one (1) year from date thereof.

ARTICLE III

Compensation for Services: For services provided herein, County agrees to pay Contractor upon completion of each scheduled training session. Payment shall be made within thirty (30) days from the start date of the training session. For the purposes herein, billing shall be in accordance with Exhibit “A”. The total amount of this Agreement shall not exceed \$39,350.00, inclusive of all expenses.

ARTICLE IV

Changes to Agreement: This Agreement may be amended by mutual consent of the parties hereto. Said amendments shall become effective only when in writing and fully executed by duly authorized officers of the parties hereto.

ARTICLE V

Contractor to County: It is understood that the services provided under this Agreement shall be prepared in and with cooperation from County and its staff. It is further agreed that in all matters pertaining to this Agreement, Contractor shall act as Contractor only to County and shall not act as Contractor to any other individual or entity affected by this Agreement nor provide information in any manner to any party outside of this Agreement that would conflict with Contractor's responsibilities to County during term hereof.

ARTICLE VI

Assignment and Delegation: Contractor is engaged by County for its unique qualifications and skills as well as those of its personnel. Contractor shall not subcontract, delegate or assign services to be provided, in whole or in part, to any other person or entity without prior written consent of County.

ARTICLE VII

Independent Contractor/Liability: Contractor is, and shall be at all times, deemed independent and shall be wholly responsible for the manner in which it performs services required by terms of this Agreement. Contractor exclusively assumes responsibility for acts of its employees, associates,

and subcontractors, if any are authorized herein, as they relate to services to be provided under this Agreement during the course and scope of their employment.

Contractor shall be responsible for performing the work under this Agreement in a safe, professional, skillful and workmanlike manner and shall be liable for its own negligence and negligent acts of its employees. County shall have no right of control over the manner in which work is to be done and shall, therefore, not be charged with responsibility of preventing risk to Contractor or its employees.

ARTICLE VIII

Fiscal Considerations: The parties to this Agreement recognize and acknowledge that County is a political subdivision of the State of California. As such, El Dorado County is subject to the provisions of Article XVI, Section 18 of the California Constitution and other similar fiscal and procurement laws and regulations and may not expend funds for products, equipment or services not budgeted in a given fiscal year. It is further understood that in the normal course of County business, County will adopt a proposed budget prior to a given fiscal year, but that the final adoption of a budget does not occur until after the beginning of the fiscal year.

Notwithstanding any other provision of this Agreement to the contrary, County shall give notice of cancellation of this Agreement in the event of adoption of a proposed budget that does not provide for funds for the services, products or equipment subject herein. Such notice shall become effective upon the adoption of a final budget which does not provide funding for this Agreement. Upon the effective date of such notice, this Agreement shall be automatically terminated and County released from any further liability hereunder.

In addition to the above, should the Board of Supervisors during the course of a given year for financial reasons reduce, or order a reduction, in the budget for any County department for which services were contracted to be performed, pursuant to this paragraph in the sole discretion of the County, this Agreement may be deemed to be canceled in its entirety subject to payment for services performed prior to cancellation.

ARTICLE IX

Default, Termination, and Cancellation:

- A. **Default:** Upon the occurrence of any default of the provisions of this Agreement, a party shall give written notice of said default to the party in default (notice). If the party in default does not cure the default within ten (10) days of the date of notice (time to cure), then such party shall be in default. The time to cure may be extended at the discretion of the party giving notice. Any extension of time to cure must be in writing, prepared by the party in default for signature by the party giving notice and must specify the reason(s) for the extension and the date on which the extension of time to cure expires.

Notice given under this section shall specify the alleged default and the applicable Agreement provision and shall demand that the party in default perform the provisions of this Agreement within the applicable period of time. No such notice shall be deemed a

termination of this Agreement unless the party giving notice so elects in this notice, or the party giving notice so elects in a subsequent written notice after the time to cure has expired. . In the event of termination for default, County reserves the right to take over and complete the work by contract or by any other means.

- B. **Bankruptcy:** This Agreement, at the option of the County, shall be terminable in the case of bankruptcy, voluntary or involuntary, or insolvency of Contractor.
- C. **Ceasing Performance:** County may terminate this Agreement in the event Contractor ceases to operate as a business, or otherwise becomes unable to substantially perform any term or condition of this Agreement.
- D. **Termination or Cancellation without Cause:** County may terminate this Agreement in whole or in part upon ten (10) calendar days written notice by County without cause. If such prior termination is effected, County will pay for satisfactory services rendered prior to the effective dates as set forth in the Notice of Termination provided to Contractor, and for such other services, which County may agree to in writing as necessary for contract resolution. In no event, however, shall County be obligated to pay more than the total amount of the contract. Upon receipt of a Notice of Termination, Contractor shall promptly discontinue all services affected, as of the effective date of termination set forth in such Notice of Termination, unless the notice directs otherwise

ARTICLE X

Notice to Parties: All notices to be given by the parties hereto shall be in writing and served by depositing same in the United States Post Office, postage prepaid and return receipt requested.

Notices to County shall be addressed as follows:

COUNTY OF EL DORADO
INFORMATION TECHNOLOGIES
360 FAIR LANE
PLACERVILLE, CA 95667
ATTN: JACQUELINE NILIUS, DIRECTOR

or to such other location as the County directs.

Notices to Contractor shall be addressed as follows:

LEARNING TREE INTERNATIONAL USA, INC.
18005 LIBRARY STREET
RESTON, VA 20190-5630
ATTN: MAUREEN MOORE, CONTRACTS MANAGER

or to such other location as the Contractor directs.

ARTICLE XI

Indemnity: The Contractor shall defend, indemnify, and hold the County harmless against and from any and all claims, suits, losses, damages and liability for damages of every name, kind and description, including attorneys fees and costs incurred, brought for, or on account of, injuries to or death of any person, including but not limited to workers, County employees, and the public, or damage to property, or any economic or consequential losses, which are claimed to or in any way arise out of or are connected with the Contractor's services, operations, or performance hereunder, regardless of the existence or degree of fault or negligence on the part of the County, the Contractor, subcontractor(s) and employee(s) of any of these, except for the sole, or active negligence of the County, its officers and employees, or as expressly prescribed by statute. This duty of Contractor to indemnify and save County harmless includes the duties to defend set forth in California Civil Code Section 2778.

ARTICLE XII

Insurance: Contractor shall provide proof of a policy of insurance satisfactory to the El Dorado County Risk Manager and documentation evidencing that Contractor maintains insurance that meets the following requirements:

- A. Full Workers' Compensation and Employers' Liability Insurance covering all employees of Contractor as required by law in the State of California.
- B. Commercial General Liability Insurance of not less than \$1,000,000.00 combined single limit per occurrence for bodily injury and property damage.
- C. Automobile Liability Insurance of not less than \$1,000,000.00 is required in the event motor vehicles are used by the Contractor in the performance of the Agreement.
- D. In the event Contractor is a licensed professional, and is performing professional services under this Agreement, professional liability (for example, malpractice insurance) is required with a limit of liability of not less than \$1,000,000.00 per occurrence. For the purposes of this Agreement, professional liability is not required.
- E. Contractor shall furnish a certificate of insurance satisfactory to the El Dorado County Risk Manager as evidence that the insurance required above is being maintained.
- F. The insurance will be issued by an insurance company acceptable to Risk Management, or be provided through partial or total self-insurance likewise acceptable to Risk Management.
- G. Contractor agrees that the insurance required above shall be in effect at all times during the term of this Agreement. In the event said insurance coverage expires at any time or times during the term of this Agreement, Contractor agrees to provide at least thirty (30) days prior to said expiration date, a new certificate of insurance evidencing insurance coverage as provided for herein for not less than the remainder of the term of the Agreement, or for a period of not less than one (1) year. New certificates of insurance are subject to the approval of Risk Management and Contractor agrees that no work or services shall be performed prior to the giving of such approval. In the event the Contractor fails to keep in

effect at all times insurance coverage as herein provided, County may, in addition to any other remedies it may have, terminate this Agreement upon the occurrence of such event.

H. The certificate of insurance must include the following provisions stating that:

1. The insurer will not cancel the insured's coverage without thirty (30) days prior written notice to County, and;
2. The County of El Dorado, its officers, officials, employees, and volunteers are included as additional insured, but only insofar as the operations under this Agreement are concerned. This provision shall apply to the general liability policy.

I. The Contractor's insurance coverage shall be primary insurance as respects the County, its officers, officials, employees and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

J. Any deductibles or self-insured retentions must be declared to and approved by the County, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the County, its officers, officials, employees, and volunteers; or the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.

K. Any failure to comply with the reporting provisions of the policies shall not affect coverage provided to the County, its officers, officials, employees or volunteers.

L. The insurance companies shall have no recourse against the County of El Dorado, its officers and employees or any of them for payment of any premiums or assessments under any policy issued by any insurance company.

M. Contractor's obligations shall not be limited by the foregoing insurance requirements and shall survive expiration of this Agreement.

N. In the event Contractor cannot provide an occurrence policy, Contractor shall provide insurance covering claims made as a result of performance of this Agreement for not less than three (3) years following completion of performance of this Agreement.

O. Certificate of insurance shall meet such additional standards as may be determined by the contracting County Department either independently or in consultation with Risk Management, as essential for the protection of the County.

ARTICLE XIII

Interest of Public Official: No official or employee of County who exercises any functions or responsibilities in review or approval of services to be provided by Contractor under this Agreement shall participate in or attempt to influence any decision relating to this Agreement which affects personal interest or interest of any corporation, partnership, or association in which he/she is

directly or indirectly interested; nor shall any such official or employee of County have any interest, direct or indirect, in this Agreement or the proceeds thereof.

ARTICLE XIV

Interest of Contractor: Contractor covenants that Contractor presently has no personal interest or financial interest, and shall not acquire same in any manner or degree in either: 1) any other contract connected with or directly affected by the services to be performed by this Agreement; or, 2) any other entities connected with or directly affected by the services to be performed by this Agreement. Contractor further covenants that in the performance of this Agreement no person having any such interest shall be employed by Contractor.

ARTICLE XV

California Residency (Form 590): All independent Contractors providing services to the County must file a State of California Form 590, certifying their California residency or, in the case of a corporation, certifying that they have a permanent place of business in California. The Contractor will be required to submit a Form 590 prior to execution of an Agreement or County shall withhold seven (7) percent of each payment made to the Contractor during term of the Agreement. This requirement applies to any agreement/contract exceeding \$1,500.00.

ARTICLE XVI

Taxpayer Identification Number (Form W-9): All independent Contractors or corporations providing services to the County must file a Department of the Treasury Internal Revenue Service Form W-9, certifying their Taxpayer Identification Number.

ARTICLE XVII

Administrator: The County Officer or employee with responsibility for administering this Agreement is Jacqueline Nilius, Director, Information Technologies, or successor.

ARTICLE XVIII

Authorized Signatures: The parties to this Agreement represent that the undersigned individuals executing this Agreement on their respective behalf are fully authorized to do so by law or other appropriate instrument and to bind upon said parties to the obligations set forth herein.

ARTICLE XIX

Partial Invalidity: If any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will continue in full force and effect without being impaired or invalidated in any way.

ARTICLE XX

Venue: Any dispute resolution action arising out of this Agreement, including, but not limited to, litigation, mediation, or arbitration, shall be brought in El Dorado County, California, and shall be resolved in accordance with the laws of the State of California.

ARTICLE XXI

Entire Agreement: This document and the documents referred to herein or exhibits hereto are the entire Agreement between the parties and they incorporate or supersede all prior written or oral Agreements or understandings.

Requesting Contract Administrator/Department Head Concurrence:

By: _____ **Dated:** _____
Jacqueline Nilus, Director
Information Technologies

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IN WITNESS WHEREOF, the parties hereto have executed this Agreement the day and year first below written.

-- COUNTY OF EL DORADO --

Dated: _____

By: _____

Chairman
Board of Supervisors
"County"

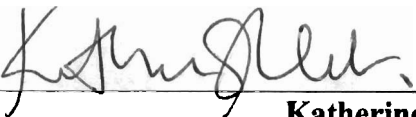
ATTEST:
Cindy Keck
Clerk of the Board of Supervisors

By: _____ Date: _____
Deputy Clerk

-- CONTRACTOR --

Dated: 9/7/06

LEARNING TREE INTERNATIONAL USA, INC.
A DELAWARE CORPORATION

By: 
Katherine Pelech
Vice-President
"Contractor"

By: 
Corporate Secretary

Dated: 9/7/06



Course 267Y Outline
Project Management: Skills for Success® ♦ 2 Days

CHAPTER 1: LAYING THE FOUNDATIONS FOR SUCCESS
 Chapter Objectives
 The Plan: A Model of What You Want People to Do and When
 The Project: Reality
 Definitions: Project, Project Management, Program
 Project Life Cycles
 The Project Process
 Defining the Project
 The Project Stakeholders
 Project "Politics" and Stakeholder Management
 Defining Project Scope
 Defining Project Scope Starting Point: Many Definitions
 Balancing Priorities
 Prioritizing Success Criteria
 Reviewing Project Feasibility
 Reviewing Strategic Risks and Assumptions
 Strategic Risk Analysis Checklist
 Identifying Project Risks: Mindmapping
 How to Analyze the Project Environment for Risk
 Recording Risks on a Risk Register
 UCS2 Case Study and Exercises: Introduction
 Hands-On Exercise 1.1: Analyzing the Project Environment for Risk
 Chapter Summary
 Personal Checklist

CHAPTER 2: DEFINING PROJECT OBJECTIVES
 Chapter Objectives
 The Planning Stage
 The Objectives Document
 Project Documents: Source of Objectives Information
 The Project Goal Statement
 Goal Statement: Examples
 Project Deliverables
 The Objectives Meeting
 How to Run the Objectives Meeting
 Hands-On Exercise 2.1: Defining Project Objectives
 Chapter Summary
 Personal Checklist

CHAPTER 3: IDENTIFYING AND STRUCTURING THE WORK
 Chapter Objectives
 Breakdown Structures
 WBS Example: By Discipline or Workgroup
 WBS Example: By Phase or Deliverable
 Using a Standard WBS Template
 Modifying a Standard WBS or Creating a New WBS
 Brainstorming
 Indented Outlining: An Alternative to WBS Graphics
 WBS That Corresponds to Outline (Design Phase Only Shown)
 Initial Task Responsibilities
 Hands-On Exercise 3.1: Work Breakdown Structures
 Chapter Summary
 Personal Checklist

CHAPTER 4: ESTIMATING TASK DURATION, WORK, AND RESOURCES
 Chapter Objectives
 Why Do We Need Good Estimates?
 Estimating Techniques I: Use Different Estimates at Different Stages of the Project
 Estimating Techniques II: Estimate for a Range—Example: Phase Reviews
 Estimating Techniques II: Estimate for a Range—Three-Point Estimating
 Estimating Techniques III: What Are You Estimating For?
 Estimating Techniques IV: Set Standards for Estimating
 Estimating Techniques V: Estimate Using Subtasks and Activities
 Estimating Techniques VI: Identify What Is Known, What Is Not Known
 Estimating Techniques VII: Include Effects of Project Environment Conditions
 Estimating Techniques VIII: Productivity Factors
 Estimating Methods and Processes
 Probability as a Tool

Probability Method
 Hands-On Exercise 4.1: Using Three-Point Estimating
 Chapter Summary
 Personal Checklist

CHAPTER 5: SEQUENCING AND SCHEDULING TASKS
 Chapter Objectives
 Precedence Networks
 Constructing a Precedence Network
 Critical Path
 Calculating Critical Path
 Calculating Critical Path: Do It Now
 Post-it Precedence Networks
 Hands-On Exercise 5.1: UCS2 Precedence Chart
 Creating the Schedule Using Gantt Charts
 Gantt Chart of Project Schedule
 Gantt Chart and Slack
 Calculating Slack
 Gantt Chart Showing Total Slack and Free Slack
 Slack on the Gantt Chart
 Task Link Types
 Task Link Types and Lag
 Hands-On Exercise 5.2: UCS2 Gantt Chart
 Chapter Summary
 Personal Checklist

CHAPTER 6: ASSIGNING AND OPTIMIZING RESOURCES
 Chapter Objectives
 Identifying Resources
 Task Types: Fixed Duration, Fixed Work, Fixed Units
 Task Types: Assigning Resources to Tasks
 Assigning Resources to Tasks
 Negotiating for Resources in a Matrix Organization
 Negotiating Task Contracts
 Sample Task Contract Form
 Analyzing Resource Allocation
 Analyzing Resource Allocation: Costs
 Optimizing Resource Use: Options
 Consequence of Automatic Leveling: End Date Moves
 Hands-On Exercise 6.1:





Course 267Y Outline
Project Management: Skills for Success® ♦ 2 Days (continued)

Scheduling Resources
Software Tools
Paper vs. PC?
Hands-On Exercise 6.2: Using
PC Project Planning Tools
Chapter Summary
Personal Checklist

**CHAPTER 7: REVIEWING FOR
RISKS AND SETTING THE
BASELINE PLAN**

Chapter Objectives
Final Stage of Planning
Risk Management Process: Key
Elements
Risk Identification
Checklist Used to Identify Risks
Risk Assessment
Risk Evaluation
Example: Risk Exposure Table
Risk Distribution Graph:
Example
Risk Management Strategies
Risk Register: Example
Contingency Planning
Key Quality Management
Processes
Establishing Controls: Measures
of Achievement
Measuring Progress Using
Milestones
Control Procedures
Sample Change Request Form
The Decision to Proceed: The
Baseline Plan
Hands-On Exercise 7.1: Risk
Management
Chapter Summary
Personal Checklist

**CHAPTER 8: RUNNING THE
PROJECT**

Chapter Objectives
Into the Real World
Working Environment: A Soft
Control System

Implementing the Project Plan
Monitoring, Analyzing,
Correcting

Bottom-Line Questions
Step 1: Monitoring
Monitor Task Progress
Project Culture
Step 2: Analyzing
Showing Changes in Schedule:
Tracking Gantt Chart
Analyzing the Source and
Impact of Variation
Projected Milestone Slip
Step 3: Correcting the
Schedule—Options
Correcting: Beware of Schedule
Obsession
Step 3: Correcting—Optimizing
the Network
Crashing the Critical Path
Limits to Crashing the Project
Milestone Reporting for
Multiple Projects
Financial Reporting
Financial Report: Planned and
Actual Costs
Cash Flow: Example
Earned Value Analysis (EVA)
Status Reports
Text Status Reporting Form
Hands-On Exercise 8.1:
Recording Project Progress
Project Closure: Completion
Hazards of the Completion Stage
Project Review Meeting Agenda
Project Closure
Hands-On Exercise 8.2:
Controlling the Project
Chapter Summary
Personal Checklist

**CHAPTER 9: PEOPLE
IMPLEMENT THE PROJECT PLAN**

Chapter Objectives
The Influence of People on
Project Success

Simultaneous Processes: Team
and Project

Successful Project Teams: Team
Development
Stages of Team Development
When Teams Get Stuck
Why Teams Do Not Cooperate
Fully

Motivation and Engagement
Motivators in Your Work
The Factors of Motivation: A
Study—Motivators
The Factors of Motivation: A
Study—Turnoffs
Supporting the Individual
Dealing With Project
Disturbances
Influence of Change on
Individual and Team
Performance
Being a Team Leader
Supporting the Team
Delegation: How to Do It
Negotiation Skills
Five Stages of Negotiating
Project Manager Networking
Skills
The Project Manager as a Role
Model
Hands-On Exercise 9.1:
Identifying Behaviors and
Actions in Role Models
Chapter Summary
Personal Checklist

**CHAPTER 10: COURSE
SUMMARY**

Course Summary
Hands-On Exercise 10.1:
Personal Review of Project
Management Processes



3. COURSE DELIVERY METHOD

The following are all included in the standard course tuition:

- **Expert Instructor:** An expert instructor from 9:00 am to 4:30 p.m. each day and available from 4:30 to 5:30 p.m. for discussion with participants. Hours are flexible to accommodate customer needs.
- **Course materials:** Comprehensive course materials and additional study material, one set per course participant.
- **Hardware and Software:** All hardware and software for hands-on courses (one workstation per two course participants).
- **Logistics Management:** Learning Tree International manages all of the logistical arrangements.
- **Instructor Fees:** Learning Tree International pays all instructor costs (travel, hotel, per diem, etc).
- **Multimedia Display System:** Learning Tree International provides all the audio and visual equipment required to support the multimedia display system used for the class. Our patent-pending, software-driven system enables the instructor to manipulate and highlight content in real time as it's being projected on two large display screens, providing the flexibility to orchestrate the presentation content and pace instantly to meet the needs of the class. As a result, the training is absorbed quickly and efficiently by the class with maximum comprehension and retention.
- **Instructor Teleconference:** The instructor will participate in a conference call with **El Dorado County** to discuss your specific needs prior to the course.
- **Course Evaluations:** Course evaluations are a key component of Learning Tree International's ongoing quality control process, monitoring both instructor quality and course content quality. The Customer agrees to have all attendees complete a detailed course evaluation of each course, utilizing course evaluation forms furnished by Learning Tree International. Learning Tree International will provide the Customer a detailed summary of the evaluation scores in addition to a copy of each individual completed evaluation.

El Dorado County will need to provide:

- **Classroom:** A suitable classroom allocated exclusively for the entire week. A 750 square foot room will accommodate 9 -16 course attendees. Please note the suggested room sizes for Hands-On and Lecture type classes on the Classroom Layout diagrams in the *Attachments* section of this proposal.
- **Facility Access and Assistance:** The instructor will require access to the facility the day prior to the first day of course execution to allow for technical set-up.



On-Site Courses

4. GUARANTEE OF QUALITY

Guarantee of Quality: Our focus on providing high quality training has been recognized by tens of thousands of organizations from around the world. If a customer sends us a written notice of dissatisfaction with a course within 60 days of the course, our simple and straightforward statement of guaranteed quality is as follows:

IF OUR CUSTOMER IS NOT SATISFIED THAT LEARNING TREE INTERNATIONAL MET OR EXCEEDED THEIR EXPECTATIONS, LEARNING TREE INTERNATIONAL WILL REFUND THE COURSE FEE IN FULL.



1-800-THE-TREE (1-800-843-8733)
www.learningtree.com

5. EL DORADO COUNTY'S TRAINING INVESTMENT

The following is Learning Tree International's **all-inclusive** fee for the delivery of this proposed curriculum:

Course Title	Course Type	Course Length	Base Fee 1-10 Attendees	Add-on Fee For Each Attendee Over 10
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Course 267Y Project Management: Skills for Success	Workshop	2-Days	\$9,125*	\$495*
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- Prices quoted are per training event.
- Courses, other than 5 day courses, that require a Monday start date, will be charged an additional \$750.
- Prices quoted are base rates for courses executed in the United States. The price for courses executed outside the United States will be the above-stated base rate plus any and all applicable import and/or export taxes, value-added taxes, extraordinary shipping charges, and any additional fees required to run the course. These costs will be passed on to the customer for payment.
- Content redesign courses, such as Course 267Y, are not on Learning Tree International's GSA Schedule Contract Number: GS-35F-4414G (valid July 01, 1999 through April 30, 2007) and must be purchased as open-market items. Content redesign courses are based on existing Learning Tree International intellectual property which is modified to accommodate customer-specific training needs.
- Learning Tree International has accepted the Cooperative Purchasing modification to its GSA Schedule Contract Number: GS-35F-4414G (valid July 01, 1999 through April 30, 2007) therefore making state and local government agencies eligible to buy off the Schedule and receive discounted pricing. *Price quoted is GSA discounted rate.



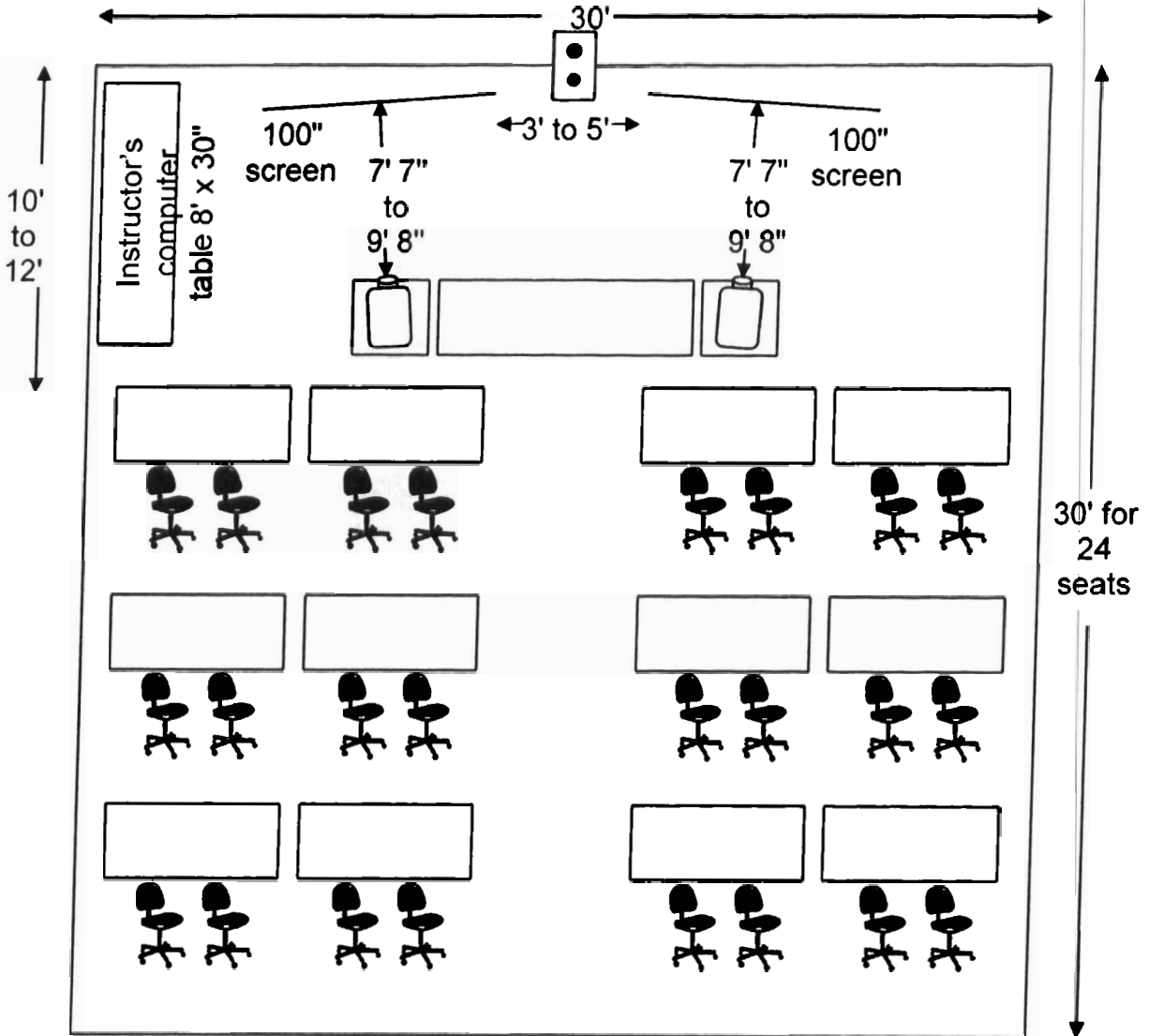
On-Site Courses

ATTACHMENTS



1-800-THE-TREE (1-800-843-8733)
www.learningtree.com

Suggested Classroom Layout On-Site Lecture Courses



Requirements

- Room available 1 day before class for setup
- Room available on a 24-hour basis during the class week
- 2 attendees per table (attendee tables are 6' x 30")
- Minimum ceiling height = 8'
- Minimum screen image size = 88" diagonal
- 1-8 attendees = 525 square feet
- 9-16 attendees = 750 square feet
- 17-24 attendees = 1,000 square feet



= 20-amp duplex outlet



= Panasonic projector with wide-angle lens

Course 296 Outline

Project Management: Skills for Success ♦ 4 Days

INTRODUCTION AND OVERVIEW

Setting the scene with stakeholders

- Analyzing the project environment
- Completing strategic planning tasks
- Selling the project plan to stakeholders

What does a project manager manage?

- Identifying the project life cycle stages
- The challenge of implementing a project
- The payoff of project evaluation

THE 6-STEP PLANNING METHOD

Defining clear project objectives

- Nailing down the goals
- Defining measurable deliverables
- Promoting team commitment
- Running the objective-setting meeting

Structuring and scheduling the project

- Defining project scope with work breakdown structures (WBS)
- Driving the plan down to task level
- Converting WBS to precedence networks
- Creating the Gantt chart schedule
- Developing milestones that matter

Developing a risk management process

- Identifying the project risks
- Evaluating the impact of risks
- Strategies for managing risks
- Reducing risks through contingency plans

■ Building confidence in the plan
Reviewing the plan and assumptions

- Does the plan meet deadlines?
- Are the resources available?
- Testing for local workflow

Managing the project resources

- Assigning resources to tasks
- Analyzing resource use in the schedule
- Optimizing the use of resources
- Reviewing the project budget

Establishing controls

- Negotiating with managers and teams
- Establishing change control procedures
- Employing milestone tracking

ESTIMATING GUIDELINES

Good practice check list

- A process for more accurate estimates
- Making good estimates matter
- Why estimating is important

Techniques that build confidence

- Eight key steps that work
- Defining what is unknown
- Three-point estimating
- Project environment conditions
- Applying statistics where appropriate

RUNNING THE PROJECT

Establishing an effective control process

- Setting the baseline schedule
- Monitoring actual task progress
- Analyzing progress against the baseline

- Correcting the project plan to achieve the objectives

Implementing the plan

- Getting the information you need
- Picking up warnings of trouble ahead
- Avoiding creeping commitments
- Knowing when and how to replan
- The role of the baseline plan

Tracking and reporting progress

- Reading information from the Gantt chart
- Tracking costs and resources against budget
- Planned vs. actual project performance
- Avoiding the 90-percent-complete trap
- When to use paper vs. PC tools

PROJECTS ARE MADE UP OF PEOPLE

Adapting to the project manager's role

- Getting commitment from the team
- Designating team member roles
- Accepting ownership and responsibility
- Designing your management role

The basics of leadership

- Identifying attributes of an effective team
- Coping with common project scenarios
- Delegating: a cornerstone skill
- Managing communications in the project
- Some basics on motivating people

Course 296 Overview

Project Management: Skills for Success ♦ 4 Days

- You Will Learn How To**
- Produce a project plan with a high expectation of successful delivery
 - Plan and run projects using a universal, clear 6-step project management method
 - Implement risk management techniques and mitigation strategies
Estimate task work and duration with confidence
Use manual and PC-based tools for planning, scheduling and budgeting
 - Implement monitoring tools and controls to keep you fully in command of the project
 - Recognize and practice the leadership skills needed to run a high-morale project

Course Benefits Today's project managers must deliver under pressure. Organizing scarce resources, developing a project management vocabulary, managing tight budgets and deadlines, controlling change throughout projects and generating maximum team performance are key aspects of effective project management.

In this course, you learn how to successfully plan, manage and deliver projects. You also learn how to implement project management processes and techniques that are aligned with international standards.

Who Should Attend This course is valuable for those interested in learning the latest techniques used in project management.

Course Workshop Through a series of interactive small- group workshops and an evolving case study, you perform the steps a project manager typically follows in planning, running, tracking and completing a project. Workshops, which utilize both manual and PC-based tools, include:

- Analyzing and planning for the project charter
- Determining task dependencies and schedules
- Defining clear project goals and measurable deliverables
- Brainstorming the work breakdown structure
- Estimating task duration and work
- Assigning and analyzing costs and resource use
- Developing risk management plans
- Producing the implementation plan
- Revising the plan to meet changed requirements
- Planning to improve your own effectiveness as a project manager



3. COURSE DELIVERY METHOD

The following are all included in the standard course tuition:

- **Expert Instructor:** An expert instructor from 9:00 am to 4:30 p.m. each day and available from 4:30 to 5:30 p.m. for discussion with participants. Hours are flexible to accommodate customer needs.
- **Course materials:** Comprehensive course materials and additional study material, one set per course participant.
- **Hardware and Software:** All hardware and software for hands-on courses (one workstation per two course participants).
- **Logistics Management:** Learning Tree International manages all of the logistical arrangements.
- **Instructor Fees:** Learning Tree International pays all instructor costs (travel, hotel, per diem, etc).
- **Multimedia Display System:** Learning Tree International provides all the audio and visual equipment required to support the multimedia display system used for the class. Our patent-pending, software-driven system enables the instructor to manipulate and highlight content in real time as it's being projected on two large display screens, providing the flexibility to orchestrate the presentation content and pace instantly to meet the needs of the class. As a result, the training is absorbed quickly and efficiently by the class with maximum comprehension and retention.
- **Instructor Teleconference:** The instructor will participate in a conference call with **El Dorado County** to discuss your specific needs prior to the course.
- **Course Evaluations:** Course evaluations are a key component of Learning Tree International's ongoing quality control process, monitoring both instructor quality and course content quality. The Customer agrees to have all attendees complete a detailed course evaluation of each course, utilizing course evaluation forms furnished by Learning Tree International. Learning Tree International will provide the Customer a detailed summary of the evaluation scores in addition to a copy of each individual completed evaluation.

El Dorado County will need to provide:

- **Classroom:** A suitable classroom allocated exclusively for the entire week. A 750 square foot room will accommodate 9-16 course attendees. Please note the suggested room sizes for Hands-On and Lecture type classes on the Classroom Layout diagrams in the *Attachments* section of this proposal
- **Facility Access and Assistance:** The instructor will require access to the facility the day prior to the first day of course execution to allow for technical set-up.



4. GUARANTEE OF QUALITY

Guarantee of Quality: Our focus on providing high quality training has been recognized by tens of thousands of organizations from around the world. If a customer sends us a written notice of dissatisfaction with a course within 60 days of the course, our simple and straightforward statement of guaranteed quality is as follows:

IF OUR CUSTOMER IS NOT SATISFIED THAT LEARNING TREE INTERNATIONAL MET OR EXCEEDED THEIR EXPECTATIONS, LEARNING TREE INTERNATIONAL WILL REFUND THE COURSE FEE IN FULL.



5. EL DORADO COUNTY'S TRAINING INVESTMENT

The following is Learning Tree International's all-inclusive fee for the delivery of this proposed curriculum:

Course Title	Course Type	Course Length	Base Fee 1-10 Attendees	Add-on Fee For Each Attendee Over 10
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Course 296 Project Management: Skills for Success	Workshop	4-Days	\$14,270	\$680
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- Prices quoted are per training event.
- Courses, other than 5 day courses, that require a Monday start date, will be charged an additional \$750.
- Prices quoted are base rates for courses executed in the United States. The price for courses executed outside the United States will be the above-stated base rate plus any and all applicable import and/or export taxes, value-added taxes, extraordinary shipping charges, and any additional fees required to run the course. These costs will be passed on to the customer for payment.
- Learning Tree International has accepted the Cooperative Purchasing modification to its GSA Schedule Contract Number: GS-35F-4414G (valid July 01, 1999 through April 30, 2007) therefore making state and local government agencies eligible to buy off the Schedule and receive discounted pricing.



Learning Tree
International

6. ON-SITE COURSE TERMS AND CONDITIONS

Training Course Confirmation: A Confirmation Letter will be sent to you which confirms, corrects and/or modifies the terms of this proposal based on your comments and an internal review by Learning Tree International. The Confirmation Letter will represent Learning Tree International's binding offer to execute the course and must be accepted by signature and returned to Learning Tree International within five (5) days of receipt. If not signed and returned within that time period, Learning Tree International will not be obligated to deliver the course(s) at the time(s) or place(s) indicated.

Payment: Course fees are due and payable within 30 days of the start date of each course.

Cancellation and Reschedule Policy: Courses may be cancelled or rescheduled without penalty if communicated more than two weeks prior to the course execution start date. Cancellations that occur less than two weeks before the scheduled start date of the course are subject to a \$3,000 cancellation/rescheduling fee. If the event is rescheduled at the time of the cancellation to execute within 90 days, 50% of the cancellation fee will be waived.

Course Evaluations: Course evaluations are a key component of Learning Tree International's ongoing quality control process, monitoring both instructor quality and course content quality. The Customer agrees to have all attendees complete a detailed course evaluation of each course, utilizing course evaluation forms furnished by Learning Tree International. Learning Tree International will provide the Customer a detailed summary of the evaluation scores in addition to a copy of each individual completed evaluation.

Intellectual Property: The Customer acknowledges that ownership of all course materials furnished under this agreement remains with Learning Tree International, including course materials that may contain course tailoring or content redesign for the Customer; however, the specific confidential information provided by the Customer to Learning Tree International (for integration into the course or otherwise) shall remain the sole property of the Customer and shall not be used by Learning Tree International in future courses. All course materials and methods (including printed material, visual aids, software, techniques and recordings) and all copyright, trademark, patent and other rights related thereto, remain the absolute property of Learning Tree International. No part of Learning Tree International's course materials, whether standard or redesigned, may be reproduced, stored in a retrieval system or transmitted in any form or by any means; electronic, mechanical, photocopying, recording or otherwise; or translated into any language without the prior written permission of Learning Tree International.

Accommodation: Learning Tree International is committed to assisting course participants subject to disabilities. Learning Tree International will provide the following at no additional cost to the employers of disabled participants: an additional seat in the classroom and an additional set of course materials for Auxiliary Aides and/or the course notes in computer-readable format, as requested by the participant's employer. The employer of the participant shall be responsible for all other costs of any necessary accommodation, including arranging and paying for Auxiliary Aides. The employer may call 1-800-843-8733 to request that Learning Tree International make the arrangements for Auxiliary Aides and bill the costs to the employer. It is the responsibility of the employer to confirm with Learning Tree International all such arrangements at least two weeks before the course.