



El Dorado County

Master Report

330 Fair Lane, Bldg A.
Placerville, California
530 621-5390
FAX 622-3645
co.el-dorado.ca.us/bos

File Number: 07-825

File ID: 07-825

Agenda Type: Agenda Item

Status: Clerk's Inbox

Version: 1

Reference:

Gov Body: Board Of Supervisors

Created: 05/10/2007

Agenda Title: HR 5-10-07 Amend Agm 704-S0611

Final Action:

Title: Human Resources Department recommending Chairman be authorized to sign Amendment I to Agreement for Services #704-S0611 with Los Rios Community College District extending the term for one (1) additional year, May 23, 2007 through May 22, 2008, without increasing compensation to provide Countywide supervisory and customer service training on an "as requested" basis for the Human Resources Department.

RECOMMENDED ACTION: Approve

FUNDING: General Fund

Notes:

Code Sections:

Agenda Date: 05/22/2007

Agenda Number:

Sponsors:

Enactment Date:

Attachments:

Enactment Number:

Same:

Hearing Date:

Contact: Donna Mullens, Ext. 6060

Next Meeting Date:

Approval History

Version	Date	Approver	Action
1	05/10/2007	Ted Cwiek	Approved
1	05/10/2007	Agenda Coordinator	Approved
Notes Approved for routing purposes only. jm			
1	05/11/2007	Sue Hennike	Approved
Notes Consent			
1	05/11/2007	Laura Gill	Approved

2007 MAY 1 PM 2:44
RECEIVED
BOARD OF SUPERVISORS
MAY 1 2007

History of Legislative File

Version:	Acting Body:	Date:	Action:	Sent To:	Due Date:	Return Date:	Result:
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Text of Legislative File 07-825

Human Resources Department recommending Chairman be authorized to sign Amendment I to Agreement for Services #704-S0611 with Los Rios Community College District extending the term for one (1) additional year, May 23, 2007 through May 22, 2008, without increasing compensation to provide Countywide supervisory and customer service training on an "as requested" basis for the Human Resources Department.

RECOMMENDED ACTION: Approve

FUNDING: General Fund

BUDGET SUMMARY:

Total Estimated Cost \$68,960.00

Funding

Budgeted \$68,960.00

New Funding \$

Savings \$

Other \$

Total Funding Available \$60,000.00

Change To Net County Cost \$0.00

Fiscal Impact: No Change to Net County Cost, as funds for this service are included in the Human Resources Department budget for the remainder of FY 2006-07. Services to be rendered after June 20, 2007 will be included in the FY 2007-08 budget. The total amount of this Agreement is not to exceed \$87,930.00, inclusive of all expenses. Two (2) Supervisory Training Tracks were completed during the one (1) year agreement, totaling \$18,970.00. The remaining balance of the Agreement is \$68,960.00 and will be used to continue Supervisory and Customer Service training on an "as requested" basis for the Human Resources Department.

Background:

Reason for Recommendation: The Board is being asked to make findings that the services being provided by this consultant are in the public's best interest, and that these services are more economically and feasibly performed by outside independent consultants.

The current one (1) year Agreement expires on May 22, 2007. This amendment will extend the Agreement until May 22, 2008, with no increase to compensation.

Action to be taken following Board approval: Human Resources will forward signed amended agreement to Contractor.

Contact: Donna Mullens x6060

Concurrences:

RUSH

Contract #: 704-S0611 Amendment I

CONTRACT ROUTING SHEET

Date Prepared: 3/27/07Need Date: If possible, by 4/6/07**PROCESSING DEPARTMENT:**
 Department: CAO/Proc. & Contracts
 Dept. Contact: Dustin Bailey
 Phone #: 5833
 Department
 Head Signature: Bonnie H. Rich
 Bonnie H. Rich
CONTRACTOR:
 Name: Los Rios Community College
 Address: 1410 Ethan Way
Sacramento, CA 95825
 Phone: 916-563-3232

 EL DORADO COUNTY COUNSEL
 20 APR 27 PM 4:41
Handwritten initials
CONTRACTING DEPARTMENT: Human ResourcesService Requested: Supervisory & Customer Service Training "As Requested"Contract Term: One Year Contract Value: \$0Compliance with Human Resources requirements? **Yes:** **No:** Compliance verified by: **COUNTY COUNSEL:** (Must approve all contracts and MOU's)
 Approved: Disapproved: Date: 4/2/07 By: Justin Kern
 Approved: Disapproved: Date: By:

 ASSIGNMENT
 DATE: 03/29/07
 ATTORNEY: JURIN
 DEPT. INDEX NO.: 02000
 BY:

PLEASE FORWARD TO RISK MANAGEMENT. THANKS!

RISK MANAGEMENT: (All contracts and MOU's except boilerplate grant funding agreements)
 Approved: Disapproved: Date: 4-2-7 By:
 Approved: Disapproved: Date: By:

 RECEIVED
 HUMAN RESOURCES DEPT
 07 APR -2 PM 2:23
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 #704-S0611 AMENDMENT I

This Amendment I to that Agreement for Services #704-S0611, made and entered into by and between the County of El Dorado, a political subdivision of the State of California (hereinafter referred to as "County"), and Los Rios Community College District, whose principal place of business is 1410 Ethan Way, Sacramento, CA 95825, (hereinafter referred to as "Consultant");

WITNESSETH

WHEREAS, Consultant has been engaged by County to provide supervisory and customer service training on an "as requested" basis for the Human Resources Department, in accordance with Agreement for Services #704-S0611, dated May 23, 2006, incorporated herein and made by reference a part hereof; and

WHEREAS, the parties hereto have mutually agreed to extend the term of said Agreement for one (1) additional year without increasing compensation, hereby amending **ARTICLE II – Term**; and

WHEREAS, the parties hereto have mutually agreed to amend **ARTICLE X – Notice to Parties** and **ARTICLE XVII – Administrator**.

NOW THEREFORE, the parties do hereby agree that Agreement for Services #704-S0611 shall be amended a first time as follows:

ARTICLE II

Term: This Agreement, as amended, shall become effective upon execution by both parties hereto and shall cover the period of May 23, 2006 through May 22, 2008.

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
HUMAN RESOURCES DEPARTMENT
330 FAIR LANE
PLACERVILLE, CA 95667
ATTN: DONNA MULLENS, CLERICAL OPERATIONS MANAGER

or to such other location as the County directs.

Notices to Consultant shall be addressed as follows:

LOS RIOS COMMUNITY COLLEGE DISTRICT
1410 ETHAN WAY
SACRAMENTO, CA 95825
ATTN: BRUCE WINNER


or to such other location as the Consultant directs.

ARTICLE XVII

Administrator: The County Officer or employee with responsibility for administering this Agreement is Donna Mullens, Clerical Operations Manager, Human Resources Department, or successor.

Except as herein amended, all other parts and sections of that Agreement #704-S0611 shall remain unchanged and in full force and effect.

Requesting Contract Administrator Concurrence:

By:  Dated: 4/9/07
Donna Mullens
Clerical Operations Manager
Human Resources Department

Requesting Department Head Concurrence:

By:  Dated: 4/10/07
Ted J. Cwick
Director
Human Resources Department

IN WITNESS WHEREOF, the parties hereto have executed this First Amendment to that Agreement for Services #704-S0611 on the dates indicated below, the latest of which shall be deemed to be the effective date of this Amendment.

--- COUNTY OF EL DORADO ---

Dated: _____

By: _____
Chair
Board of Supervisors
"County"

ATTEST:
Cindy Keck
Clerk of the Board of Supervisors

By: _____ Date: _____
Deputy Clerk

-- CONSULTANT --

Dated: 5/7/07

By: Marie B. Smith
EDUCATION Marie Smith
Vice-Chancellor of ~~Science~~ and Technology
Los Rios Community College District
"Consultant"

COPY
ORIGINAL

AGREEMENT FOR SERVICES #704-S0611

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 Los Rios Community College District, whose principal place of business is 1410 Ethan Way, Sacramento, CA 95825, (hereinafter referred to as "Consultant");

WITNESSETH

WHEREAS, County has determined that it is necessary to obtain a Consultant to provide supervisory and customer service training on an "as requested" basis for the Human Resources Department; and

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

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

ARTICLE I

Scope of Services: Consultant agrees to perform services necessary to provide supervisory and customer service training on an "as requested" basis for the Human Resources Department. Services shall be in accordance with Exhibit "A", marked "Scope of Work and Budget Detail", incorporated herein and made by reference a part hereof.

The services shall be provided by the Consultant under the general direction of the Human Resources Director (the "Administrator"). The Administrator, or his/her designee, shall monitor the services, and no new services shall commence without prior approval and authorization.

Consultant represents that is a public postsecondary educational institution with the capability and the experience to provide services in the area as specified herein and that the instructor(s) to provide these services will hold valid qualifications authorizing instruction at the postsecondary level in the area specified.

County shall provide appropriate classroom facilities for each session (and for a reasonable time before and after each session) together with the following equipment: white board, flip chart, TV and VCR, overhead projector and screen.

ARTICLE II

Term: This Agreement shall become effective upon final execution 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 Consultant monthly in arrears. Payments shall be made within thirty (30) days following the County's receipt and approval of itemized invoice(s) identifying services rendered. For the purposes of this Agreement billing shall be in accordance with Exhibit "A".

All invoices shall be submitted to:

El Dorado County
Human Resources Department
330 Fair Lane
Placerville, CA 95667

The total amount of this Agreement shall not exceed \$87,930.00, 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

Consultant 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, Consultant shall act as Consultant only to County and shall not act as Consultant 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 Consultant's responsibilities to County during term hereof. County acknowledges that Consultant may be providing the same or similar educational services to other individuals or entities and that the provision of those services do not violate this provision.

ARTICLE VI

Assignment and Delegation: Consultant is engaged by County for its unique qualifications and skills as well as those of its personnel. Consultant 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 Consultant/Liability: Consultant 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. Consultant 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. County 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.

Consultant 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 Consultant or its employees.

County shall furnish appropriate classroom facilities for each session (and for a reasonable time before and after each session) together with the following equipment: white board, flip chart, TV & VCR, overhead projector and screen.

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.

- B. **Bankruptcy:** This Agreement, at the option of the County, shall be terminable in the case of bankruptcy, voluntary or involuntary, or insolvency of Consultant.
- C. **Ceasing Performance:** County may terminate this Agreement in the event Consultant 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 or Consultant may terminate this Agreement in whole or in part seven (7) calendar days upon written notice for any reason. 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 Consultant, 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 or its giving a Notice of

Termination, Consultant 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. 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.

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
HUMAN RESOURCES DEPARTMENT
330 FAIR LANE
PLACERVILLE, CA 95667
ATTN: STEVE JANICE, DIRECTOR

or to such other location as the County directs.

Notices to Consultant shall be addressed as follows:

LOS RIOS COMMUNITY COLLEGE DISTRICT
1410 ETHAN WAY
SACRAMENTO, CA 95825
ATTN: BRUCE WINNER

or to such other location as the Consultant directs.

ARTICLE XI

Indemnity:

The County and the Consultant shall each assume the responsibility and the liability for the acts and omissions of their own officers, agents, or employees in connection with the performance of their official duties under this Agreement. For tort liability purposes, neither the County nor the Consultant nor their officers, agents or employees shall be considered an agent of the other.

Each party shall assume the responsibility and liability for and shall indemnify, defend, and hold harmless the other party, its agents, officers and employees from and against any and all liabilities, obligations, losses, damages, penalties, fines, claims, actions, suits, costs and expenses, and disbursements (including legal fees and expenses) of any kind and nature whatsoever imposed in, asserted against, incurred or suffered by the other party or its agents, officers or employees by reason of damage, loss or injury (including death) of any kind or nature whatsoever to persons or property caused by or in any way relating to or arising out of any negligent act or action, or any neglect, omission or failure to act when under a duty to act on their part or any of their agents, officers or employees in its or their performance of services or obligations hereunder.

Where negligence is determined to have been contributory, principles of comparative negligence

will be followed and each party shall bear the proportionate cost of any loss, damage, expense and liability attributable to that party's negligence.

ARTICLE XII

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

- A. **Full Workers' Compensation and Employers' Liability Insurance covering all employees of Consultant 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 Consultant in the performance of the Agreement.**
- D. **In the event Consultant 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. **Consultant 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 the Risk Management Division, or be provided through partial or total self-insurance likewise acceptable to the Risk Management Division.**
- G. **Consultant 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, Consultant 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 the Risk Management Division and Consultant agrees that no work or services shall be performed prior to the giving of such approval. In the event the Consultant 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. 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 Consultant shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.
- J. 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.
- K. 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.
- L. Consultant's obligations shall not be limited by the foregoing insurance requirements and shall survive expiration of this Agreement.
- M. In the event Consultant cannot provide an occurrence policy, Consultant 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.
- N. Certificate of insurance shall meet such additional standards as may be determined by the contracting County Department either independently or in consultation with the Risk Management Division, 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 Consultant 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 Consultant: Consultant covenants that Consultant 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. Consultant further covenants that in the performance of this Agreement no person having any such interest shall be employed by Consultant.

ARTICLE XV

California Residency (Form 590): Consultant is a California Community College District, a political subdivision of the State of California created under its laws whose district encompasses portions of El Dorado County, Yolo County, Placer County and all of Sacramento County.

ARTICLE XVI

Taxpayer Identification Number (Form W-9): All independent Consultants 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 Steve Janice, Human Resources Director, 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 or Sacramento County, California, and shall be resolved in accordance with the laws of the State of California. Consultant waives any removal rights it might have under Code of Civil Procedure Section 394.

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.

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CONTRACT ADMINISTRATOR CONCURRENCE:

By:  Dated: 5/23/06
Steve Janice, Director
Human Resources Department

REQUESTING DEPARTMENT HEAD CONCURRENCE:

By:  Dated: 5/24/06
Laura S. Gill
Chief Administrative Officer

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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: 5/23/06

By: James R. Sweeney
JAMES R. SWEENEY Chairman
Board of Supervisors
"County"

ATTEST:
Cindy Keck, Clerk
of the Board of Supervisors

By: Cindy Keck Date: 5/23/06
Deputy Clerk

-- CONSULTANT --

Dated: 05/01/06

By: Marie B. Smith
Marie Smith
Vice-Chancellor of Science and Technology
Los Rios Community College District
"Consultant"

Los Rios

COMMUNITY COLLEGE DISTRICT



MAKING BUSINESS BETTER

EXHIBIT A

March 27, 2005

SCOPE OF WORK AND BUDGET DETAIL EL DORADO COUNTY SUPERVISORY AND CUSTOMER SERVICE TRAINING

Training Objectives

EDC leadership identified the following training objectives in pre-contract meetings. These objectives will be confirmed, added to and modified in phase one of the program, during interviews with key managers, supervisors and other identified EDC information sources.

Supervisory Program

LRCCD supplied detailed objectives for a number of supervisory modules previously developed by LRCCD. EDC representatives identified which modules and objectives they wished to incorporate into the EDC supervisory program.

Note: See Attachment B I for complete supervisory objectives)

Customized Customer Service Program

We used feedback from EDC leadership and needs expressed in the pre-contract meetings to develop a draft plan to meet these needs. We will expand and reinforce this information in the information gathering and development phase of this program.

Preliminary objectives identified for customized customer service academy include:

- Determining customer needs and taking the steps to meet them
- Using active and effective listening skills
- Developing positive attitudes toward customers
- Knowing what to say when customers are difficult

See all detail in Attachment B II (Customized Customer Service)

Summary of Intervention Proposed

Supervisory Training

This program is ready for delivery in May with minimal preparation.

Preparation includes:

- Minimal interviewing, calls, discussions and customization
 - Determine “ Supervisory Projects” and how to best incorporate into program Note: Supervisory projects are ongoing, reinforce supervisory training concepts and culminate in a presentation at the last program session, “Putting it All Together”. The projects result in supervisors taking learned lessons and applying them to actual county issues and problems and ultimately result in real performance improvement.

 - Second item of customization is equally important.
 - Align the customer service component of the supervisory program to the customer service staff training. This will allow supervisors to support and reinforce the customer service message being taught in staff customer service day. This is very important in order to achieve real performance improvement.

Customer Service

- Interviews and information gathering in order to determine EDC customer service needs
- Customization of customer service program
 - Note – LRCCD has several dozen customer service modules from which we can borrow material for sessions. The majority of the work is determining which materials to use, in order to achieve priority needs.
- Develop materials
- Delivery of one-day program beginning in May/June

Intervention Hours Delineated

Meet with management/leaders/supervisors regarding supervisory projects and aligning customer service. Incorporate information into program material. Up to 8 hours

- Meet with management/leaders/supervisors/staff regarding customer service needs, issues and objectives and develop one-day customer service training program for staff based on this feedback. Up to 16 hours

- Instruction (Supervisory Program) Each program is 44 hours
Six programs May 2006 – June 2007, Each program is five and one-half days (two modules per day)
Total of six 44-hour programs **264 hours**

- Instruction (Customer Service Program) Each program is 8 hours
12 programs (one per month) June 2006 – June 2007
Total of twelve eight-hour programs **96 hours**

Training Impact Assessment

Many of our public agency clients find this an ideal way to prove the value of training to management. When training departments are able to quantitatively show improvement in performance, based on training delivered, they see increased management satisfaction and funding for their department(s). We are able to offer pre and post assessment of both the supervisory and customer service training to show real performance results / improvement.

- EDC Level one assessment would show satisfaction with the training. Summaries produced and emailed 2-weeks post training.
- EDC Level II assessment would show learning pre and post training. See Attachment IV for example.
- EDC Level III assessment would demonstrate change in behavior or transfer of learning for supervisors and staff. (Questions/survey developed during design phase). In addition, supervisor projects will provide yet another means to measure level III impact for supervisory training.

SEE Attachment B III for example of Level II assessment and Attachment B IV (Measuring Training Impact the Los Rios Way)

Instruments loaded online (LRCCD sited and maintained) easy to use.

I am happy to share other examples and further assessment info upon request.

Materials

Supervisory Program

Custom EDC Supervisory Program Manual (*Custom cover and Unibind*)

Team Building Toolkit (text)

Multiple articles, handouts, supplemental materials (custom folder)

Total \$40 per person (Unibinder \$20, toolkit \$15 and supplemental \$5)

Customer Service Program

Custom Customer Manual for EDC employees (*Custom cover and Unibind*)

Total \$5 per person

Room Rental

Up to 42 daily room rentals at El Dorado Center, LRCDD, Placerville,
@ max of \$80 per session or \$3,360

NOTE: See page four for Training Investment

Table 1-1 Training Investment

Line Item	Cost
Customize/design supervisory program	Up to 6 hours @ \$185 per hour
Customize/design customer service program	Up to 16 hours @ \$185 per hour
Instruction (supervisory program) One program 44 hours. 6 programs = 264 hours	264 hours @ \$185 per hour
Instruction (customer service program) One program 8 hours. 12 programs = 96 hours	96 hours @ \$185 per hour
Optional - Training Impact Assessment Level I, II and III assessment for both programs	40 hours @ \$185 per hour
Books/Materials Includes duplication, binding tax, and all other associated charges. Supervisory (SP) materials \$40 per participant Customer service (CS) materials \$5 per participant.	* SP / 125 * \$40 = \$5,000 ** CS / 300 * \$5 = \$1,500
Classroom 42 occurrences @ max \$80 per session	\$3,360
Total Investment for:	Instruction/Development/Assessment 422 hours @ \$185 per hour: \$78,070
125 Supervisors 300 Staff persons customization, training and training impact assessment	Materials: \$6,500 Room Rental \$3,360
	Total Investment: \$87,930

** Assumes 25 participants per session and 6 session per year (every 2 months)
Total of 125 supervisory training packages - 125 * \$40 = \$5,000*

*** Assumes 25 participants per session times 12 session per year (monthly)
Total of 300 customer service packages - 300 * \$5 = \$1,500*

Timetable

ATTACHMENT B I

**LRCCD/TS/ EDC PROPOSAL
March 2006**

SUPERVISORY MODULES AND OBJECTIVES

Module 1 / Becoming a Supervisor

Learn the challenges to effective supervision and how to face these challenges through adequate personal preparation, acquiring key information, and developing critical skills. By the end of this course, participants will:

- Understand the challenges of effective supervision
- Discover the 9 skill sets needed for effective supervision
- Learn the supervisor's 4 key knowledge areas
- Know the challenges of coming up from the ranks
- Have an overview of the course and clarify personal goals

Module 2 / Optimizing Employee Performance

Using performance management tools and best practices, be able to increase employee performance by creating an environment that encourages growth and results. Upon completion of this module, participants will be able to:

- Get direction through SMART goals
- Provide a performance environment
- Recognize and reward good performance
- Develop employees
- Analyze and address performance

Module 3 / Supervisor As Leader

Using leadership tools and best practices, participants will be able to influence others for greater results. Upon completion of this module, participants will be able to:

- Understand the relationship and difference between supervision and leadership
- Apply situational leadership principles
- Influence others
 - Empower employees
- Delegate effectively

Module 4 / Communication

Using communication best-practices, be able to establish effective 360° communication in order to know the listener's perspective, establish expectations, give effective feedback and utilize the most effective communication media.

Upon completion of this module, participants will be able to:

- Understand the power of communication frames
- Know how to frame your message for each listener
- Use listening techniques to listen for meaning
- Identify effective ways to receive and give feedback

Module 5 / Team Development

Using team management best-practices, a chartered team can be synergistic, productive, and fun. Upon completion of this module, participants will be able to:

- Describe the value of teamwork and the characteristics of a successful team
- Determine where the team is (Forming, Storming, Norming or Performing)
- Take the team to the next level of development
-

Module 6 / Conflict Resolution

Not all conflict is unhealthy. Properly managed, conflict can be kept at a healthy level to provide an environment of honest feedback. The focus of this module is to learn how to deal with unhealthy conflict and the very important role of the leader in facilitating healthy conflict. Upon completion of this module, participants will be able to:

- Understand the nature of conflict
- Understand and be able to use a three-step process of turning the emotional response to a rational one
- Know how to use assertive/responsive language to cope with a difficult person

Module 7 / Coaching

Use the craft of coaching to motivate and inspire optimal performance in employees and to help develop employee potential. By the end of this course, participants will:

- Know the difference between coaching and managing
- Understand how levels of authority relate to coaching
- Know the value of "switching hats" when appropriate
- Learn a 4-step model for coaching employees
- Be able to ask high quality questions to find out what is important (values and criteria) to employees

Module 8 / Customer Service Culture

NOTE: This particular module will be modified to align and support the customized customer service one-day program for all county personnel.

Using customer service tools and best practices, participants will be able to establish a service culture that pleases customers and improves employee performance.

Upon completion of this module, participants will be able to:

- Improve employee performance by a service vision
- Lead customer service by example
- Establish and maintain a customer service culture

Module 9 / Meeting Facilitation

Increased ability to lead meetings that stay focused and get results. Upon completion of this module, participants will:

- Understand how to prepare and manage meetings / Set the tone for a meeting
- Identify group dynamics and the best ways to address them
- Understand the role of the facilitator
- Identify the main stages of the facilitation process

Module 10 / Change Management

You will develop an increased ability to lead employees through organizational change and transition. Upon completion, participants will be better able to manage change by:

- Understanding the effects of globalization and technology on organizations
- Understanding the critical difference between organizational and human change
- Assessing the adaptability to change of self and others
- Applying effective strategies to manage the human stages of change
- Creating an action plan for an actual change at work

Module 11 / Putting it All Together

Incorporate all the material presented in the program into a pragmatic, actionable plan for improved supervisor performance.

By the end of this module, participants will:

- Review the major supervisory lessons from all previous modules
- Implement improved supervisory performance
- Report out how improved supervisory performance has benefited EDC

Outcome

A presentation on the last day of the workshop

10-minute PowerPoint; 5 minute Q&A

Presentation objective: The audience understands...

- Your (and/or your employees') changed behavior (improved performance)
- How the change was implemented
- What went well and didn't go well with implementation
- Benefits of the change to the organization

Purpose of the project

Address an area of performance improvement for yourself and/or your team

Apply concepts and skills from the training to real work

Help others understand "here's what I've done and how it's going"

Examples of opportunities

- "I'd like to improve my team's performance by taking it from its current level (Forming or Storming) to a higher level (Norming or Performing)."
- "I'd like to improve my communication skills by increasing participative meetings and constructive feedback."
- "I'd like to improve my motivation skills by applying various methods to different individuals. I'll choose several employees to motivate and use the most appropriate methods."

ATTACHMENT B II

LRCCD/TS/ EDC PROPOSAL
March 2006

CUSTOMIZED CUSTOMER SERVICE

Title TBD

Title will be determined jointly LRCCD/EDC – title to match goals and objectives determined in pre-training consultation. Potential Titles (Service is an Attitude, Public Service Essentials, Public Service Protocol, Service that Delights)

Outcome:

There will be an Increased, consistent and infectious growth of staff ability to serve and delight El Dorado County's clients.

Objectives for Training

Upon completion of this class, participants will be better prepared to serve the public by:

- Determining customer needs and taking the steps to meet them
- Using active and effective listening skills
- Developing positive attitudes toward customers
- Knowing what to say when customers are difficult

Draft Training Day

Eight hour day

1. Introduction and Overview
2. **Essential #1 – The Principles of Customer Service**
 - a. Service
 - b. Attitude
 - c. Consistency
 - d. Follow-through
3. **Essential #2 – Connecting through Communication**
 - a. Active listening
 - b. Clarity of expression
4. **Dealing with Difficult Customers**
 - a. General strategies
 - b. Specific strategies
 - i. What to say when...
5. Review and action plan

ATTACHMENT B III

LRCCD/TS/ EDC PROPOSAL
March 2006

EXAMPLE OF SUPERVISORY LEARNING ASSESSMENT (LEVEL II)

Multiple choice; circle the best choice.

1. Which one of the following is not in a top supervisory skill?
 - a. Communication
 - b. Coaching
 - c. Resource management

2. The Pareto Principle is also known as:
 - a. The law of the farm
 - b. 80/20
 - c. Concise Communication

3. Which one of the following is not a step in establishing a team?
 - a. Assemble, organize, and empower.
 - b. Performing.
 - c. Create a team process plan.

4. What happens when a manager is heavily involved in advice with a Performing team?
 - a. Results
 - b. Frustration
 - c. Motivation

5. The "I Statement" is an effective technique for:
 - a. Delivering sensitive messages
 - b. Mission statements
 - c. Establishing core values for continuous improvement

True or False statements – Place a T or F in the blanks below.

6. ___ In the Forming Stage, the team leader should provide structure to get the team to the next stage.
7. ___ Venting is an effective way to manage interpersonal conflict.
8. ___ In the Norming Stage, the team leader should share leadership to get the team to the next stage.
9. ___ Monetary recognition is usually the most powerful workplace motivator.
10. ___ Ethnicity is a cause of poor communication.
11. ___ Negative feedback should be descriptive rather than evaluative.
12. ___ Language barriers can be a cause of poor communication.
13. ___ Jargon at cross-departmental meetings promotes better communication.
14. ___ Nodding and matching facial expressions are aspects of Active Listening.

15. Match the concept, definition or person on the right with the term on the left.

- | | |
|--------------------------------|--|
| ___ Culture | b. Conflict response |
| ___ Forming | d. The 3 rd stage of Tuckman's Model |
| ___ Storming | e. Earned authority |
| ___ Norming | f. Begin with the end in mind |
| ___ Performing | g. Norms that an organization's members share |
| ___ Vocal qualities | h. The 2 nd stage of Tuckman's Model |
| ___ Organization's mission | i. The organization's reason/purpose for existence |
| ___ Self-directed | j. The 1 st stage of Tuckman's Model |
| ___ Situational leadership | k. 38% of a message |
| ___ Personal mission statement | l. A style of coercive power to manage others. |
| ___ Accommodate | m. Links a leader's style with employee readiness. |
| ___ Autocratic | n. The arousal and direction of behavior. |
| ___ Motivation | o. A team that takes responsibility for results. |
| ___ Credibility | p. The 4 th stage of Tuckman's Model |

Essays (write answers on the back of this sheet)

16. Your team's typical behavior has the following characteristics:

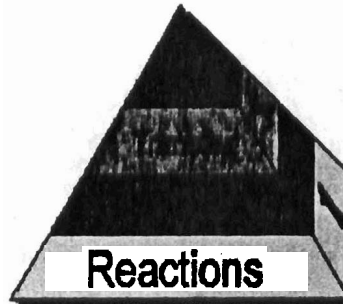
- Differing opinions are expressed dogmatically.
- Feedback is received with a defensive attitude.
- "The real meeting takes place in the hallway."

Put together a plan to remedy the issues above.

17. You stepped into an efficiently run organization. The previous supervisor tightly controlled the situation. You want to maintain productivity, but would like to begin "humanizing" the environment. Which one of the following actions would you take and why?

- a. Do what you can to make the group feel important and involved.
- b. Emphasize the importance of deadlines and tasks.
- c. Intentionally not intervene.
- d. Get the group involved in decision making and see that objectives are met.

Measuring Training Impact The Los Rios Way



In Kirkpatrick's four-level model, each successive evaluation levels is built on information provided by the lower level

The Los Rios Community College District's, Training Source delivers training and consulting designed to achieve real performance improvement in the agencies and companies with whom we work. In order to gauge whether any performance improvement has taken place, we use and recommend the use of Kirkpatrick's Four-Level Model.

We can perform this measurement on a contractual basis or assist you to design a program for yourself.

WHY DO IT?

- Show measurable progress in your training programs.
- Document real quantitative and qualitative performance improvement.
- Demonstrate the value of your training department.
- Contribute to the growth and improvement of your agency or company.

THE FOUR LEVELS

- 1) **Reaction** – Participants rate their reaction, response or satisfaction with the training. This helps us to understand whether or not participants think they have received something of value. Information is collected through an evaluation after each session.
Note: delivered at no cost in all LRCCD, TS Training Programs.
- 2) **Learning** – Participants increase in knowledge or skills (e.g., do participants have a better understanding of leadership at the end of a program, can participants in a training program create Excel macros now, who could not do so before)
- 3) **Behavior** – Participants demonstrate a measurable change in behavior or performance on the job (e.g., participants are measurably more cooperative with colleagues, measured as better leaders, or achieve higher levels of customer satisfaction).
- 4) **Results** – The organization experiences measurable results in output or quality. This is the most difficult to measure, but is the most important in terms of organizational change (e.g., quality of work, quantity of work, safety, customer satisfaction). – internal/external, other measurable or quantifiable...

Bruce Winner
Los Rios CCD, The Training Source
Custom Course Coordinator
Phone 916.563.3232
Email winnerb@losrios.edu
Web site www.trainingsource.losrios.edu