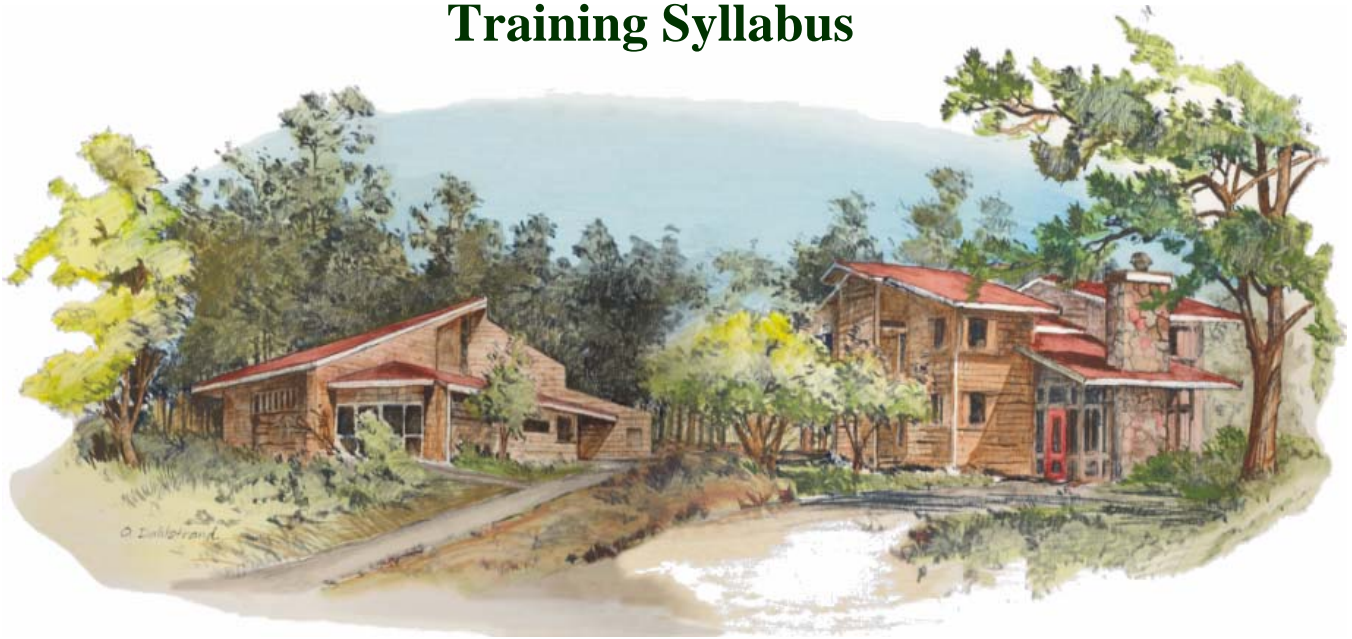


# Business and Fiscal Services

November 5–9, 2006

## Training Syllabus



William Penn Mott Jr. Training Center



# Memorandum

**Date:** October 11, 2006

**To:** Supervisor

**From:** Department of Parks and Recreation  
William Penn Mott Jr. Training Center

**Subject:** Employee Attendance at Formal Training

An employee from your office will soon be attending the formal training program described in the attached syllabus. Please insure that the employee is fully prepared to attend the session and that the groundwork is laid for the employee's implementation of the training upon returning to work.

You can assist with capturing the full value of the training by taking the following steps:

### Prior to Training

1. Make sure that **specific** employee needs are identified and, if necessary, called immediately to the attention of the Training Coordinator.
2. Review with the employee the reason for the employee's attendance.
3. Review objectives and agenda with the employee.
4. Discuss objectives and performance expected after the training.

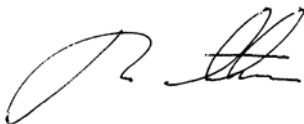
### Immediately Following Attendance

1. Discuss what was learned and intended uses of the training.
2. Review the employee's assessment of the training program for its impact at the workplace and review the due date of the Post-Training Evaluation form.
3. Support the employee's use of the training at the work place.

### Prior to Three Months Following Training

1. Employee after discussion with the supervisor login to the Employee Training Management System (ETMS) to complete the Post-Training Evaluation form.
2. Supervisor evaluates the effectiveness of the training on the employee's job performance and logs in to the ETMS to complete the Training Effectiveness Assessment form.

Thank you for your assistance in seeing that the full benefit of training is realized.



Broc E. Stenman  
Department Training Officer

Attachment

cc: Participant

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***Mission Statement  
Training Office***

***The mission of the Training Office is to improve organizational and individual performance through consulting, collaboration, training and development.***

## TRAINING CENTER STAFF

Broc Stenman ..... Department Training Officer  
Michael Green..... Assistant Department Training Officer  
Joanne Danielson ..... Training Specialist  
Chuck Combs..... Training Specialist  
Dave Galanti ..... Training Specialist  
Michelle Gardner..... Cadet Training Officer  
Connie Breakfield..... Cadet Training Officer  
Pat Bost ..... Assistant Program Coordinator  
Pamela Yaeger ..... Assistant Program Coordinator  
Bill Spencer ..... Assistant Program Coordinator  
Summer Kincaid..... Assistant Program Coordinator  
Brian Petersen ..... Assistant Program Coordinator

## THE MISSION

*of the California Department of Parks and Recreation is to provide for the health, inspiration and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high quality outdoor recreation.*



## FORMAL TRAINING GUIDELINES

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Welcome to formal training, an essential component in your career development.

Since 1969, our Department has been providing a continuously changing number of diverse training programs at its Training Center. The Department strives to enhance your learning and job performance with formal training of the highest quality. This fact demonstrates the commitment your Department has made to you in your service to the public. This commitment is costly and represents an important investment in you and your career. You and the Department realize a return on that investment by your positive participation and post training follow-through.

The program you will be participating in is described in this training syllabus, which outlines what you can expect from this training and what is expected of you. This syllabus details what you should do before you leave for training; what to do when you arrive; what you will be doing while in training; and, importantly, what you should be able to do when you return to your work site. Specifically:

1. **SYLLABUS:** The syllabus is now accessible on the Employee Training Management System (ETMS). You should print a copy of the syllabus to bring with you to class. Your copy of this syllabus is an important part of your training experience and should be brought with you to training. Read it before you arrive and review it following the program along with material you received at training.
2. **PRE-TRAINING ASSIGNMENTS:** Your completion of pre-training assignments is essential to the success of your training. You are responsible for all reading assignments in preparation for classroom sessions. Time will be provided during working hours to accomplish any assignments which involve either individual or group efforts and resources. (Pre-training assignments are listed in the "Training Attendance Requirements" section.)
3. **TRAVEL:** Arrange your travel to and from the training through your District or Office. (No reimbursement for travel expense - including per diem costs - will be approved for travel not specifically authorized in advance by the District)

Superintendent.) Individuals may claim reimbursement for incidental expenses incurred as outlined in DAM 0410.6. The Training Center does not have the capability to provide transportation to or from the Sacramento International Airport.

4. **HOUSING: The Training Center has reserved rooms at the Hawthorn Suites (two-bedroom, two-bathroom suites) for individuals who reside outside of the Sacramento region only. You will need to call Hawthorn Suites at 1-800-767-1777 before October 20, 2006 to secure your lodging. Please state that you are with the Department of Parks and Recreation Business & Fiscal Group and confirm your lodging request.**

Your accommodations will be paid for by the Training Office. This does not preclude living in another facility; however, securing lodging at another location will be at the participant's own expense. Housing will be available from 3:00 p.m. on the date of arrival until 12:00 noon on the date of departure. If you need to cancel or change your reservation, you must contact the Hawthorn Suites directly. When you arrive at the Hawthorn Suites, go directly to the front desk for your room key.

5. **MEALS:** Meals are arranged at the discretion of the participant. The Training Office will reimburse the cost of your meals at the current per diem rate. Send a Travel Expense Claim (Std. 262a) to the Training Center for approval and processing. (The Training Center will reimburse meals starting with dinner on the first day and ending with lunch on the last day.)
6. **TRAINING LOCATION:** The training for this program will occur at the Resources Building (1416 9<sup>th</sup> Street, Sacramento, CA 95814) in the Redwood Training Room, 1404-17.
7. **PARKING:** There are several city lots located near the Resources Building. Please see attachment for exact locations and cost. You will be reimbursed for parking.
8. **CLOTHING:** Field Uniforms are not required. Professional business attire shall be worn.

Because we are in the Resources Building with many other Departments, and the image we project as State Park employees is important not only during working hours but off duty hours as well, your informal sportswear should be appropriate.

9. **COURSE LEADERS:** The formal training you will attend is developed and, for the most part, conducted by experienced State Park employees in field and staff positions. Some courses will be conducted by qualified instructors from other agencies and educational institutions. Your course leaders have proven their ability and knowledge in their profession, and provide a level of expertise difficult to match.

10. TRAINING OFFICE STAFF: Summer Kincaid (916-651-6725) is your Training Specialist and has been assigned responsibility for your training group as well as for your training program. During the program, you may be asked to assist Training Office staff in the logistics of your training program; please work with Training Staff to help make your training experience pleasant and meaningful.
11. TRAINING MATERIALS: May be made available to you at both your unit and the Training Center. Handout materials issued at your unit should be brought to training for possible use. A conference binder or notebook will be issued to you at the training session for note taking and convenience in handling materials. Bring your own pens and pencils.
12. ATTENDANCE: Regular attendance is a critical course requirement and your participation is important to the success of this training. All absences, except those of an emergency nature, must be approved in advance by the Training Specialist.
13. CELL PHONES: As a courtesy to your fellow participants and course leaders ensure that your cell phone is turned off during classes. Participants should not be receiving or making cell phone calls during class time. Please limit those calls to your breaks.
14. FAX: The Training Office's FAX number is (916) 654-6021.
15. TELEPHONE: Limit phone calls during classroom hours to urgent business or emergencies. Anyone wishing to contact you by telephone during working hours should call (916) 651-6725.
16. COLLEGE CREDIT: Most Training Office programs are accredited by Monterey Peninsula College for lower division credit. If you successfully complete an accredited program, you will receive either a letter grade or a credit/no-credit designation.
17. POST-TRAINING ASSIGNMENTS: In connection with formal training are to be completed under the direction of your supervisor.

**California State Parks  
Located in the Resources Building  
1416 9<sup>th</sup> Street, Room 1404-17  
Sacramento, CA 95814**

**Directions**

The Downtown streets are labeled numerically and alphabetically. The numbers start from the west and increase toward the east. (The street letters go from the north to the south) The Resources Building is located at the corner of 9<sup>th</sup> and N Streets. N Street is a one-way street following west to east; 9<sup>th</sup> Street is one-way, following north to south.

From the airport, traveling south on I-5 to the Resources Building:

Take the J Street exit towards Downtown. At the bottom of the exit, turn a sharp right onto 3<sup>rd</sup> Street. Turn left onto Capitol Mall, (the Capitol building will be on your left side). Turn right onto 9<sup>th</sup> Street. The Resources Building is located at the corner of 9th and N Streets.

**Parking**

The following rates are subject to change without notice:

The closest parking lots are located at 1500 10<sup>th</sup> Street and 1517 11<sup>th</sup> Street. Both lots are located between O and P Streets. All day rates for each lot: \$20.

The most economical lot is located at the northwest corner of 7<sup>th</sup> and Capitol. This is a City Parking Lot. Daily rate: \$8.

Another economical lot is located on J Street, between 7<sup>th</sup> and 8<sup>th</sup>. Entrance into the lot is on the right hand side. There is a large green and white sign affixed to the parking structure, entitled PARKING. The entrance is very close to 8<sup>th</sup> Street. The Early Bird Special, prior to 9:30 am: \$9.

A City Parking Lot is located between 5<sup>th</sup> and 7<sup>th</sup> Streets. There are three entrances into the lot. Enter on the right hand side, on J, 7<sup>th</sup> and L Streets. All day rates are \$14.

**Visitor's Badge**

The program will be presented in the Redwood Training Room which is located on the 14<sup>th</sup> floor of the Resources Building, 1416 9<sup>th</sup> Street, Sacramento, CA 95814, in Room 1404-17. It is required that you check-in at the Security Station on the first floor of the Resources Building. Please present photo identification (State Driver's License or I.D. Card) to receive a Visitor's Badge.

## PROGRAM ATTENDANCE CHECKLIST

To assist you in your preparation for formal training session at the Redwood Training Room, the following checklist is provided.

- Call the Hawthorn Suites at 1-800-767-1777 before October 20, 2006 to secure your lodging (two-bedroom, two-bathroom suites). State that you are with the Department of Parks and Recreation Business and Fiscal Group and confirm your lodging. Securing lodging at another location will be at participant's own expense.**
- Be sure you have read and understand the Business & Fiscal Program Syllabus prior to the first scheduled session.
- Complete your Pre-Training Assignment (see page 6 of this syllabus).
- Arrange your travel through your District/Section Office.
- Bring the following with you to training:
  - Business and Fiscal Services Program Syllabus
  - Professional business attire (uniforms are not required for this program)
  - Pens and pencils

**If you have questions or need assistance, contact Summer Kincaid, Training Specialist:**

**Phone:** 916-651-6725  
**Fax:** 916-654-6021  
**Email:** [skincaid@parks.ca.gov](mailto:skincaid@parks.ca.gov)



## **PRE-TRAINING ASSIGNMENT**

The Business and Fiscal Services Unit is interested in finding out if districts/units are currently utilizing certified Small Business (SB), Micro Business (MB) and Disabled Veteran Business Enterprise (DVBE) businesses for purchasing goods and/or contracting for service.

**A Pre-Training Assignment will be emailed to all participants for completion on Wednesday, October 11, 2006. The due date for completion is November 6, 2006.**

Participants will receive three listings (Word doc.) to be reviewed and completed on a computer.

1. SB/MB/DVBE Office Supply List
2. SB/MB/DVBE IT Goods and Services List
3. SB/MB/DVBE/Maintenance, Repair, and Operating (MRO) Supply List

Please review all listings to see if you are currently utilizing a certified SB/MB and/or DVBE business, **and if it's not listed**, add them to the listings. Write a "short description" of the types of goods and/or services each vendor provides.

If you are currently ordering supplies and/or contracting for services with a company near your district and you think it's a small or micro business (e.g., "Mom & Pop" shop), **but it is not certified**, make a list of **Potential Certified Small Business or Micro Businesses**. Provide the company name, address, telephone and FAX number. It is possible these vendors can be certified!

Once you have completed your review, additions/updates make a CD of **All Listings** and bring the CD with you to the Small Business and Disabled Veterans Business Enterprise Session conducted by Cathy Croly on November 6, 2006. If you have any questions you may contact Cathy at 916-653-4319.

## **POST-TRAINING ASSIGNMENT**

Prior to ninety days after the completion of this program, the employee and his/her supervisor should sit down and discuss the impact and assess the effectiveness this program has had on the employee. Then both the supervisor and employee should login to the Employee Training Management System (ETMS) and complete the Post-Training Evaluation form (an email will be sent to both employee and supervisor notifying them that the evaluation needs to be completed). Once you login to the ETMS, you will need to fill out the evaluation form before you will be able to do anything else.

The post-training evaluation process is intended to provide a bridge between classroom instruction and the on-the-job application of training. The information obtained through this process will assist the training participant, supervisor, and Training Center in providing a return on the investment the Department has on training.

**BUSINESS AND FISCAL SERVICES GROUP 10 - AGENDA**  
**November 5-9, 2006**

**Sunday**  
**November 5**

1300-     **Hotel Registration at the Hawthorn Suites**

**Monday**  
**November 6**

0800-0900	Welcome and Orientation	Demetrak/Paschal
0900-1000	Budgets	Lopez/Summers
1000-1100	Small Business and DVBE	Croly
1100-1200	Telephone Reconciliation	Hurtig/Kelly
1200-1300	LUNCH	
1300-1700	Basic Purchasing	Stone/Hosmann/ Miranda
1300-1700	Intermediate Purchasing	Livingstone/Ibarra/ Wood

**Tuesday**  
**November 7**

0800-1700	Calstars Information Data Training Session (CID)	Bailey/Kroll/ Zehnle/Ortega
0800-1000	IT Purchasing Session	Hosmann
0800-1000	Purchasing Authority Over \$5000	Stone/Miranda
0800-1000	Purchasing Authority Under \$5000	Livingstone/Ibarra
1000-1200	Purchasing Authority Over \$5000	Stone/Miranda
1000-1200	Purchasing Authority Under \$5000	Livingstone/Ibarra
1000-1200	IT Purchasing Session	Hosmann
1200-1300	LUNCH	
1300-1500	CAL-CARD Revisions	Hosmann
1300-1500	California Automated Travel System (CalATERS)	Alvarez
1500-1600	Buy Recycle	Livingstone
1600-1700	Amendments	Livingstone

**Wednesday**  
**November 8**

0800-1700	Calstars Information Data Training Session (CID)	Bailey/Kroll/ Zehnle/Ortega
0800-1000	IT Purchasing Session	Hosmann
0800-1000	Purchasing Authority Over \$5000	Livingstone/Ibarra

**BUSINESS AND FISCAL SERVICES GROUP 10 - AGENDA**  
**November 5-9, 2006**

0800-1000	Purchasing Authority Under \$5000	Stone/Miranda
1000-1200	Purchasing Authority Over \$5000	Livingstone/Ibarra
1000-1200	Purchasing Authority Under \$5000	Stone/Miranda
1000-1200	IT Purchasing Session	Hosmann
1200-1300	LUNCH	
1300-1500	CAL-CARD Revisions	Hosmann
1300-1500	California Automated Travel System (CalATERS)	Alvarez
1500-1600	Buy Recycle	Livingstone
1600-1700	Amendments	Livingstone

**Thursday**  
**November 9**

0800-0900	Buy Recycle	Livingstone
0800-0900	Purchase Estimates	Miranda
0800-1000	California Automated Travel System (CalATERS)	Alvarez
0900-1000	Amendments	Livingstone
0900-1000	Intranet Demo	Hosmann
1000-1100	Amendments	Livingstone
1000-1100	Purchase Estimates	Miranda
1000-1200	California Automated Travel System (CalATERS)	Alvarez
1100-1200	Buy Recycle	Livingstone
1100-1200	Intranet Demo	Hosmann

**BUSINESS AND FISCAL SERVICES TRAINING**

**Hours 34**

**Program Outline**

Introduction .....	1
Budget Update .....	1
Telephone Reconciliation .....	1
Introduction to Purchasing PAM .....	4
Intermediate/Advanced Purchasing.....	4
Business and Fiscal Services..... Intranet Training Demo	1
Cal-Card Revisions .....	2
IT Purchasing .....	2
Buy Recycle .....	1
Amendments .....	1
CalATERS .....	2
Purchasing Under \$5000.....	2
Purchasing Over \$5000.....	2
SB/DVBE.....	1
Purchase Estimates .....	1
Calstars Information Data.....	8
<b>Total Hours .....</b>	<b>34</b>

\*If participants attend all sessions the total hours will be 34

## **BUSINESS AND FISCAL SERVICES TRAINING**

### **PROGRAM PURPOSE AND OBJECTIVES**

Purpose: To facilitate a working knowledge of various procurement and payment processes within the Department of Parks and Recreation. The training is designed to enable the participant to research fiscal and accounting issues resourcefully and to identify whom to contact with the Business and Fiscal Services sections for questions and guidance.

Program Objectives: By the close of the program the participant will be introduced to and have familiarity with

1. The Department's delegation programs
2. Small Business and Disabled Veterans Business Enterprise
3. All areas of Calstars Information Data
4. Expenditure tracking and reconciliation documents
5. Encumbrance
6. Purchasing
7. California Automated Travel Expense Reimbursement Systems (CalATERS)
8. Budget Update
9. Telephone Reconciliation