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Description of document:	List(s) of periodic employee colloquia, brown bag lunch talks and employee seminar discussions held at United States Executive Office of The President (EOTP) Office of Management and Budget (OMB) 2006 – 2008
Requested date:	12-November-2008
Released date:	29-December-2008
Posted date:	01-April-2009
Source of document:	Office of Management and Budget FOIA Officer 725 17th Street, NW Room 9026 Washington, DC 20503 Fax: 202.395.3504

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EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D. C. 20503

DEC 29 2008

This responds to your Freedom of Information Act (FOIA) request to the Office of Management and Budget (OMB) dated November 12, 2008, which was received in this office on November 28, 2008. Your request asked for "a copy of the list(s) of periodic employee colloquia, brown bag lunch talks, and employee seminar discussions held at OMB in 2006, 2007 and 2008 to date, preferably including at minimum their title/subject, the speaker and the date."

Upon a thorough search of our records, we have found 43 pages potentially responsive to your request. Please note that certain portions of these 43 pages have been redacted pursuant to FOIA Exemption 2, 5 U.S.C. 552(b)(2). Exemption 2 exempts from mandatory disclosure information that is related to purely internal agency practices.

There is no charge for the enclosed pages since the fee would be less than the minimum amount for which there is a charge.

Sincerely,

A handwritten signature in black ink that reads "Dionne Hardy". The signature is fluid and cursive, with the first name "Dionne" and last name "Hardy" clearly distinguishable.

Dionne Hardy
FOIA Officer

Enclosures

McLaren, Christopher

From: McLaren, Christopher

Sent: Friday, September 12, 2008 3:34 PM

To: DL-OMB-ALL

Subject: Training opportunity: Pathways to Leadership Executive Seminar Series

You are invited to:

Pathways to Leadership Executive Seminar Series: Building Leaders for the Budget Community

A series of five conversations with senior executives from the federal budget community that will focus on how they got where they are and creative ways you can build your leadership skills. Seminars are focused around the five Executive Core Qualifications (ECQ):

- **Leading Change:** ability to bring about strategic change, both within and outside the organization, to meet organizational goals; ability to establish an organizational vision and to implement it in a continuously changing environment
- **Leading People:** ability to lead people toward meeting the organization's vision, mission, and goals; ability to provide an inclusive workplace that fosters the development of others, facilitates cooperation and teamwork, and supports constructive resolution of conflicts
- **Results Driven:** ability to meet organizational goals and customer expectations; ability to make decisions that produce high-quality results by applying technical knowledge, analyzing problems, and calculating risks
- **Business Acumen:** ability to manage human, financial, and information resources strategically
- **Building Coalitions:** ability to build coalitions internally and with other Federal agencies, State and local governments, nonprofit and private sector organizations, foreign governments, or international organizations to achieve common goals

Five Days, Ten Leaders: Speakers include Budget Directors from several departments; CFOs; and OMB executives: Beth Robinson, Richard Turman, Kathy Stack, Steve Isakowitz, Pam Haze, Tony Scardino, and Andy Schoenbach. And convener Melissa Kline, program examiner at OMB.

Logistics: 4:15 - 5:30; September 23 and October 6, 14, 21 and 29. Department of Education. Cost is free but sign-up required for building clearance. Complete information and sign-up at <https://max.omb.gov/community/x/yYEUCw>

Sponsored by the Budget Line of Business Human Capital Workgroup.

Thanks,

12/12/2008

Chris McLaren
Training Officer

Executive Office of the President
Office of Management and Budget
202-395-5159
202-395-3504 (fax)

✉ **Training opportunity: New Analyst Training (All OMB employees are welcome!)**

From McLaren, Christopher

To DL-OMB-ALL

Cc

Subject Training opportunity: New Analyst Training (All OMB employees are welcome!)

OMB New Analyst Training begins Monday, September 22nd

You are invited to participate in OMB New Analyst Training beginning Monday, Sept. 22 through Friday, Oct. 3. topics such as an overview of OMB statutory offices, tips for being an effective analyst and an introduction to bi specialized topics such as apportionment, personnel, FACTS II and credit programs.

Click on the link below for the complete agenda and to download training materials as they become available. (registration is required.

<https://max.omb.gov/community/x/bADnCc>

Whether you are a new analyst eager to learn all about OMB or an experienced analyst in need of fresher train professional development! **All employees are welcome.**

Thanks,
Chris McLaren
Training Officer

Executive Office of the President
Office of Management and Budget
202-395-5159
202-395-3504 (fax)

McLaren, Christopher

From: McLaren, Christopher

Sent: Monday, November 03, 2008 2:06 PM

To: DL-OMB-ALL

Subject: Training: Want to hone your writing skills for the upcoming budget season?

Technical Instructions for Writing Appropriations Language for the President's Budget

We are pleased to announce that OMB's General Counsel Office staff will be presenting the first of a series of training sessions on legal drafting and interpretation. The first session will focus on writing appropriations language for the President's budget.

Session topics are:

- Overview of appropriations language for the President's Budget
- Rules for punctuation
- What are provisos?
- Correct procedure for insertions and deletions
- Period of availability for funds

You'll review appropriations language and work through in-class exercises to hone your skills and prepare for the upcoming budget season.

Who: All OMB staff is welcome

What: Technical Instructions for Writing Appropriations Language (President's Budget)

When: Thursday, Nov. 20 from 11 AM to 12:30 PM

Where: NEOB Room 10103

Please sign-up for the training at the following site: <https://max.omb.gov/community/x/PYGoD>

Assistant General Counsel Kimberley Luczynski will conduct the training. Space is limited and participation is available on a first-come, first-serve basis. If a large number of staff sign up for the course, we will offer multiple sessions of the training.

Later trainings will address appropriation language in budget amendments and continuing resolutions. Please provide suggestions for other topics of interest to OMB staff.

McLaren, Christopher

From: McLaren, Christopher
Sent: Friday, December 05, 2008 9:07 AM
To: DL-OMB-ALL
Subject: Training Blast! Upcoming Dec. & Jan. Training Opportunities

OMB Training Blast!

Below is a list of upcoming training opportunities for OMB staff.

Technical Trainings

- Handouts Posted from Technical Instructions for Writing Appropriations Language for the President's Budget

Lunch & Learns

- **TODAY** New Analysts Brownbag: 12/05 – Noon to 1 PM, NEOB 10103 (All first year analysts welcome!)
- **NEW!** BRD Brownbag: Implications of Integrating Formulation, Execution and Finance (12/22 – 12:30 to 1:30; NEOB Eatery)
- EOP Brownbag: Stress Factors in the Workplace: Coping with Conflict (12/10 – 10 to 11:30; 1800 G ST – **sign-up required** by COB, Monday, December 8)
- EOP Brownbag: Money Management: Holiday Debt Hangover (01/14 – 10 to 11:30; 1800 G ST)

Community Trainings

- 01/08 – MAX Community Training for Beginners (1:30 to 3; NEOB 8103 – sign-up required)
- 01/15 – MAX Advanced Community Training (1:30 to 3; NEOB 8103 – sign-up required)
- 01/29 – MAX Community Training for Beginners (10:30 to 12; NEOB 8103 – sign-up required)
- Additional offerings in February and March; sign up early because classes fill quickly.

Visit OMB Training for links to past presentations and resource materials. **And, need refresher training for the upcoming budget season?** Check out BRD's enhanced presentations.

Are you aware of a training opportunity not included on the list above? Send me an email and include your event in the next Training Blast!

Full event details listed below and on the Master Training Calendar.

New Analysts Brownbag: With the transition underway and a new budget season starting up, we want to bring new analysts together to reflect on the new analysts training, share lessons learned, and explore online training resources. And, if you've joined OMB after the September trainings, you'll get chance to meet other analysts and ask questions of your peers. All first-year analysts are welcome!

Implications of Integrating Formulation, Execution and Finance: Chris Fairhall (Budget Concepts Branch) talks about implications (both policy and operational) stemming from efforts he has led in integrating budget and finance for 15 years. All staff are welcome to attend; no RSVP required.

12/12/2008

MAX Community Training for Beginners: The beginner's class covers the basics such as how to add and edit pages, restrict pages, move pages, and add attachments. (Note: This training is for the MAX Community. It **does not** cover A-11 or any of the other MAX applications. For A-11 resources, please click [here](#).)

MAX Advanced Community Training: The advanced class covers more advanced features such as macros, Direct Edit, consolidate tables and text, etc. (Note: This training is for the MAX Community. It **does not** cover A-11 or any of the other MAX applications. For A-11 resources, please click [here](#).)

Stress Factors in the Workplace: Coping with Conflict: EAP Counselor Zenia Kuzman with EAP Consultants hosts a training session for all EOP staff to understand the dynamics of conflict; to identify the causes of conflict, especially in the workplace; and to teach you the skills needed to develop a collaborative conflict management style. While aimed at conflict in the workplace setting, much of what is learned is also applicable to personal and family lives. Location: 1800 G ST, 10th Floor, Conf Rooms 1 & 2. **Seating is limited; please RSVP to Jill Colburn by COB, Monday, December 8.**

Money Management: Holiday Debt Hangover: EAP Consultants hosts a training session for all EOP staff to discuss money management strategies for the New Year. Location: 1800 G ST, 10th Floor, Conf Rooms 1 & 2. RVSP will be required. Further details to follow in January's Training Blast!

McLaren, Christopher

From: McLaren, Christopher
Sent: Friday, November 14, 2008 2:03 PM
To: DL-OMB-ALL
Subject: Training Blast! Upcoming Nov & Dec Training Opportunities

OMB Training Blast!

Below is a list of upcoming training opportunities for OMB staff.

Technical Trainings

- Technical Instructions for Writing Appropriations Language (11/20 – 11 to 12:30; NEOB 10103 – signup required)
- **NEW SESSION ADDED!** Technical Instructions for Writing Appropriations Language (12/01 – 10 to 11:30; NEOB 10103 – signup required)

Lunch-&-Learns

- BRD Brownbag: Economic Assumptions with Patrick Locke (11/19 – 12:30 to 1:30; NEOB Eatery)
- EOP Brownbag: Stress Factors in the Workplace; Coping with Conflict (12/10 – 10 to 11:30; 1800 G ST)

Community Trainings

- MAX Community Training for Beginners (11/17 – 10:30 to 12; NEOB 8103 – signup required)
- MAX Community Training for Beginners (11/20 – 1:30 to 3; NEOB 8103 – signup required)
- MAX Advanced Community Training (12/11 – 10:30 to 12; NEOB 8103 – signup required)

External Trainings

- AABPA Fall Symposium – Navigating Transition, Leading Change (11/18 – registration required)
- Tax Reform's Challenges and Opportunities (12/05 – 8:45 to 4:30; Brookings Institute – registration required)

Visit OMB Training for links to past presentations and resource materials! **And, need refresher training for the upcoming budget season?** Check out BRD's enhanced presentations!

Are you aware of a training opportunity not included on the list above? Send me an email to include your event in the next Training Blast!

Full event details listed on the Master Training Calendar.

Technical Instructions for Writing Appropriations Writing: OMB's General Counsel Office staff present the first in a series of training sessions on legal drafting and interpretation. The first session focuses on writing appropriations language for the President's budget. Later sessions address appropriation language in budget amendments and continuing resolutions. Topics include rules for punctuation, provisos, procedure for

insertion/deletions, and the period of availability. Sign-up is required and each session is limited to 40 participants.

Economic Assumptions Brown Bag Lunch: Patrick Locke will lead a discussion on the development of economic assumptions and how they relate to the economy and budget.

MAX Community Training for Beginners: The beginner's class covers the basics such as how to add and edit pages, restrict pages, move pages, and add attachments. Advanced classes are currently full, but will be available in early 2009. (Note: This training is for the MAX Community. It **does not** cover A-11 or any of the other MAX applications.)

MAX Advanced Community Training: The advanced class covers more advanced features such as macros, Direct Edit, consolidate tables and text, etc. (Note: This training is for the MAX Community. It **does not** cover A-11 or any of the other MAX applications.)

Stress Factors in the Workplace: Coping with Conflict: Offered through OA's Employee Assistance Program, monthly sessions focus on work/life balance and are held at 1800 G Street for all EOP staff.

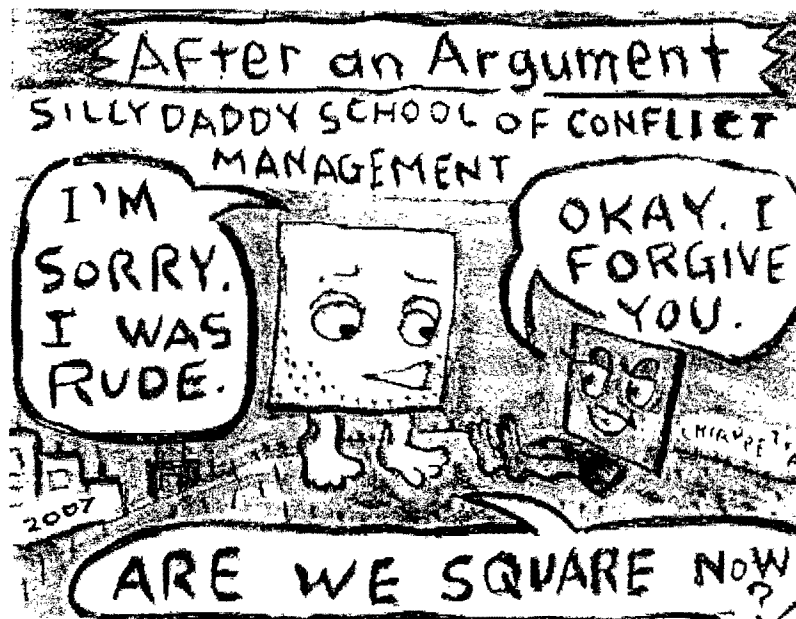
AABPA Fall Symposium – Navigating Transition, Leading Change: The AABPA Fall Symposium takes place Tuesday, 11/18 at the Capital Hilton Hotel (16th, between K and L Streets NW). The theme of the symposium in this year of transition to a new administration is: Navigating Transition, Leading Change. Registration and attendance fees are required.

Tax Reform's Challenges and Opportunities: Brookings, the Urban-Brookings Tax Policy Center (TPC) and Tax Analysts will co-host a day-long forum that explores timely policy recommendations to the incoming president and his transition team. Registration is required.

McLaren, Christopher

From: Warner, Sharon A.
Sent: Wednesday, September 03, 2008 4:57 PM
To: McLaren, Christopher
Cc: Moone, Jamesa C.
Subject: FW: Upcoming Brownbag Seminar - Conflict Management

From: Shrader, Wayne
Sent: Tuesday, June 17, 2008 5:58 PM
To: DL-OMB-ALL
Subject: Upcoming Brownbag Seminar - Conflict Management



CONFLICT MANAGEMENT
(Facilitated by Management Concepts Inc.)
A tool for decoding, learning from and surviving conflict.

Virtually everyone acknowledges he or she could be better at conflict management. Discomfort, avoidance and emotion are common responses. How can people learn to manage and even benefit from conflict?

DISCUSSION TOPICS:

- The causes and costs of conflict

- The 5 styles of conflict management
- Your conflict style and its pro's and con's

YOU WILL LEARN:

- The causes of conflict
- How to productively enter, and exit, a conflict
- Different conflict styles and how they interact

Cost: Free! (just bring your lunch)

Date: Thursday, July 17, 2008

Time: 12:00 to 1:00 p.m.

Register: email: <mailto:wshrader@omb.eop.gov>
(space is limited and seats will be filled in the order
which you register)

From: Shrader, Wayne
Sent: Wednesday, July 02, 2008 8:58 AM
To: DL-OMB-ALL
Subject: UPDATED - Time Management and Effective Business Writing classes at Executrain

These classes are offsite at the vendors location.

Time Management - July 14th - ~~████~~ b2

Effective Business Writing - July 16th - ~~████~~ b2

More information can be found at <http://www.executrain-dc.com/Schedule.htm>

Thanks,

Wayne Shrader
Program Analyst

Executive Office of the President
Office of Management and Budget

Phone: (202) 395-5159
Fax: (202) 395-3504

From: Shrader, Wayne
Sent: Wednesday, July 02, 2008 8:43 AM
To: DL-OMB-ALL
Subject: Time Management and Effective Business Writing classes at Executrain

Taking Enrollments Now!

Time Management – July 14th
Effective Business Writing – July 16th

Call 703-506-9800 or email at register@executrain-dc.com

12/12/2008

<p style="text-align: center;">Time Management</p> <p style="text-align: center;">Duration: 1 day - July 14th, 2008</p>
<p>Description</p> <p>This course teaches participants to set priorities, which is the first step in learning how to manage time effectively. In addition, participants learn techniques to create a more efficient workplace, including developing strategies for skill improvement with respect to scheduling, analyzing, planning, avoiding procrastination, and handling interruptions. Participants will also be exposed to a variety of time management tools, including planners and calendars.</p>
<p>Objectives:</p> <ul style="list-style-type: none"> • allocate time. • prioritize tasks. • analyze, plan, and schedule time. • avoid procrastination. • manage interruptions and information flow. • use time management tools.
<p style="text-align: center;">Effective Business Writing</p> <p style="text-align: center;">Duration: 1 day - July 16th, 2008</p>
<p>Description</p> <p>Though businesses increasingly rely on technology, technological skills alone do not guarantee success in the workplace. You must still develop your ideas, express them clearly, and persuade others of their viability. This course offers effective strategies to sharpen your writing skills by structuring your ideas logically, exercising diplomacy in letters and reports, and shaping your arguments.</p>
<p>Objectives:</p> <ul style="list-style-type: none"> • Organize and write clear and concise email and instant messages that are appropriate to your company's business culture. • Write an Internal Announcement • Write an Email Responding to Routine Requests • Write an Email to Respond Positively to Customer Complaints • Write Bad-News Messages • Writing a Business Letter • Write a Thank-You Letter • Organize and write a business proposal, complete with visuals, and an executive summary that employ effective strategies of persuasion.

From: Wright, Lauren E.
Sent: Friday, February 29, 2008 1:35 PM
To: DL-OMB-Branch Chiefs; DL-OMB-DADs; DL-OMB-PADs and Policy Officials
Cc: Shrader, Wayne
Subject: Upcoming Performance Management Training Sessions - Mark your calendars

I am pleased to announce that we will be offering two different management training sessions that will be provided in-house by Management Concepts. We are receiving a considerable cost reduction to offer these sessions on our premises. Course dates, and descriptions are below. Please email Wayne Shrader to let him know which session you will be attending.

Cost Information: The cost for both courses will come out of central funds

Course Title: Managing and Appraising Employee Performance

Course Dates: April 8-9, 2008

Background: This course has been held in previous years at OMB.

Who should attend: Managers who have never attended this course before.

Course Topics Include:

- Achieving collective ownership of outcomes by involving employees in the goal setting process
- Providing constructive feedback during performance appraisals
- Developing performance standards and measures to support OMB goals
- Distinguishing among levels of employees performance
- Identifying professional development opportunities for employees
- Building strong relationships with employees through open communication and ongoing feedback

Course Title: Mastering Employee Performance Conversations

12/12/2008

Course Dates: March 19-20, 2008

Background: This is the first time this course is being offered in OMB.

Who should attend: Managers who have attended Managing and Appraising Employee Performance.

Course Topics Include:

- Utilizing various communication approaches to reach a shared understanding of expectations
- Developing effectively written performance plans to capture performance conversations
- Monitoring employee performance using various communication approaches
- Delivering performance-focused feedback
- Confidently holding difficult, performance-related conversations
- Engaging others in the performance discussion in a meaningful way
- Uncovering personal perceptions that may block effectiveness when discussing performance
- Communicating recognition and appreciation for successful performance

More information about course location and times will come at a later date. If you have any questions about these courses please let me or Wayne Shrader know.

-----Original Message-----

From: Wright, Lauren E.

Sent: Friday, February 08, 2008 9:03 AM

To: DL-OMB-ALL

Subject: PART Training next week

In the attempt to offer more training to staff, the PPM Branch is offering three PART courses next week in room 450.

PART Training is available next week. The following are the sessions available:

PART Refresher Training for examiners who have already completed a PART assessment
Wednesday, 2/13, 130-3pm, room 450, EEOB

PART 101 for new examiners and for examiners who have completed a new PART assesement
Thursday, 2/14, 930-1130am, room 450, EEOB
Friday, 2/15, 930-1130am, room 450, EEOB

If you have any questions, please contact James Hurban at 56833.

From: Shrader, Wayne
Sent: Thursday, February 21, 2008 6:23 PM
To: DL-OMB-Branch Chiefs; DL-OMB-DADs
Cc: Shea, Robert J.
Subject: Upcoming Training Opportunities

I am pleased to announce that we will be offering new in-house training this year provided by outside vendors. We have gone to these vendors and received a considerable cost reduction to offer this training on our premises. Course dates, and costs are given below. Course descriptions are attached. Please submit your nominations to me, in priority order and course and date requested, for each individual.

- Nominations for the March 6th Microsoft Access Level I class are due to me NLT Thursday, February 28.
- All other nominations are due by March 15th.

Please remember, space is limited, so the earlier you get your nominations to me, the more likely it is that your staff will be included!

UPCOMING TRAINING OPPORTUNITIES				
Course Title	Division Cost Per Participant (if we have 15 students)	Division Cost Per Participant (if we have 20 students)	Length of Course	Date(s) Offered
VENDOR: EXECUTRAIN				
Excel I	██████ b2		6 hours	May 1
Excel II	██████ b2		6 hours	May 29
Excel III	██████ b2		6 hours	June 5
VENDOR: EXECUTRAIN				
Access Level I	██████ b2		6 hours	March 6 (nominations needed by February 28th)
Access Level II	██████ b2		6 hours	April 10
Access Level III	██████ b2		6 hours	May 6
VENDOR: MANAGEMENT CONCEPTS				

12/12/2008

Appropriations Law Seminar	██████ b2 ██████ b2	3 Days	June 17-19
The Legislative Process: Working with Congress	██████ b2 ██████ b2	1 Day	July 9

Please let me know if you have any questions.

Thanks,

Wayne Shrader
Program Analyst

Phone: (202) 395-5159

From: Shrader, Wayne
Sent: Tuesday, April 29, 2008 1:15 PM
To: DL-OMB-ALL
Subject: Upcoming Training Opportunities

Due to an overwhelming response, we are now offering a second session of Excel Level II on Tuesday, May 27 and a second session of Excel Level III on Tuesday, June 3.

We are also now offering PowerPoint Levels I and II in June.

If you are interested in attending please have your branch chief submit your name to me by Friday, May 16. Course dates, and costs are given below. Course descriptions are attached.

Please remember, space is limited, so the earlier your branch chief submits your name, the more likely it is that you will be included!

UPCOMING TRAINING OPPORTUNITIES				
NEW OFFERINGS				
VENDOR: EXECUTRAIN				
Course Title	Division Cost Per Participant**	Length of Course	Date(s) Offered	Seats Available
PowerPoint I	██████ b2	6 hours	4-Jun	15
PowerPoint II	██████ b2	6 hours	25-Jun	15
PREVIOUS OFFERINGS				
VENDOR: EXECUTRAIN				
Course Title	Division Cost Per Participant**	Length of Course	Date(s) Offered	Seats Available
Excel I	██████ b2	6 hours	1-May	2
Excel II (1st session)	██████ b2	6 hours	29-May	FULL
Excel II (2nd session)	██████ b2	6 hours	27-May	10
Excel III (1st session)	██████ b2	6 hours	5-Jun	FULL
Excel III (2nd session)	██████ b2	6 hours	3-Jun	12

** Please note: Last minute cancellations will be charged to the division if a replacement isn't found.

12/12/2008

From: Wright, Lauren E.
Sent: Wednesday, January 17, 2007 12:16 PM
To: DL-OMB-DADs; DL-OMB-Branch Chiefs; DL-OMB-PADs and Policy Officials
Cc: Moone, Jamesa C.; Warner, Sharon A.
Subject: Managing and Appraising Employee Performance - reprise!

Several years ago we conducted this course for all of our SES. We are going to be conducting this course once again, revised to include a session on writing measurable performance goals. This course will be held March 14-16, 2007 (2 full days, one half day). The feedback from the last course was that it was very useful, even for the old-timers!

Under both the Human Capital Scorecard and our SES Performance Management System to provide this training to all of our managers.

We are working on the contract with Management Concepts and I am trying to get an estimate on the number of attendees. Please let me know if you will be able to attend this course. Please let me know as soon as possible (not later than January 31st) if you will be able to attend this course.

Here is a very brief description of the course content and key topic areas:

Day 1

1. Introduction and overview of performance management
 - Defining performance management
 - Benefits of an effective performance management system
 - The performance management process
2. Performance Planning
 - Clarifying roles and expectations
 - job descriptions and work expectations
 - Aligning organizational goals and objectives
 - Characteristics of well written performance objectives
3. Reviewing Progress and Coaching
 - Gathering appropriate appraisal data
 - What shouldn't be measured
 - Documenting performance
 - Revisiting/Revising performance expectations
 - Conducting progress review sessions

- Coaching and feedback skills
- Providing effective feedback

Day 2

1. Planning the Performance Appraisal
 - Continuous performance appraisal
 - What to cover
 - Planning to accommodate fundamental differences
 - Common appraisal errors to avoid
 - Preparing for the performance appraisal discussion
 - Legal concerns to consider when preparing appraisals
2. Conducting the Performance Appraisal Discussion
 - Steps in the process
 - Opening the discussion
 - Discussing accomplishments
 - Identifying developmental areas
 - Presenting the final rating
 - Revising the performance plan for coming year
 - Closing the discussion
3. Handling Appraisal Challenges and Concerns
 - Refusal to acknowledge appraisal
 - Blatant hostility
 - Inflated self-assessment
 - Poor Performance
 - Requests for training
 - Defective standards/elements

Day 3 (two half-day sessions, one in am and one in pm)

Writing measurable standards and elements.

Writing that Works - June 13-16, 2006

Erika Saleski
Kathleen O'Connell

Writing that Works - July 18-21, 2006

Beth Higa

Powerful Presentations - May 9-10, 2006

Evan Christman

Powerful Presentations - July 11-12, 2006

Jennifer Brown
Erika Saleski

12/12/2008

From: Wright, Lauren E.
Sent: Wednesday, May 16, 2007 3:45 PM
To: DL-OMB-DADs
Cc: Moone, Jamesa C.
Subject: MS EXCEL TRAINING OPPORTUNITIES

I am pleased to announce *another* summer training opportunity for OMB staff! The Administration Office has contracted with ManTech to deliver **MS Excel** courses at the beginner, intermediate, and advanced levels. Central funds will cover the costs of participants. Details on course dates and descriptions are provided below. All classes will be held in the NEOB Training Room (8103).

Please complete and return the attached nomination form to Jamesa Moone by Friday, June 8th. Each division can submit two (2) names per course level. In addition, a special drawing will be held to fill a few extra slots available in each class. Space is limited, so be sure to get your nominations in soon!

Course Schedule & Descriptions:

Beginner Classes - covers basic features of Excel: entering and editing data, formatting, formulas, page setup, and printing spreadsheets.

Wednesday, July 25 10:00 a.m.-12:00 noon

Tuesday, August 14 1:00-3:00 p.m.

Note: If the majority of your staff have Excel experience, consider new hires (permanent) for beginner classes.

Intermediate Classes - provides standardized instruction on creating templates, sorting and filtering data, creating/modifying charts, and importing and exporting data.

Thursday, July 12 1:00-3:00 p.m.

Tuesday, July 31 10:00 a.m. -12:00 a.m.

Advanced Classes - will cover navigating large spreadsheets, grouping worksheets, using Excel PivotTables to create data reports.

Wednesday, June 20 10:00 a.m.-12:00 p.m.

Tuesday, July 10 1:00-3:00 p.m.

This page last changed on Oct 20, 2008 by rosemarie_c._crow@omb.eop.gov.

2008 New Analyst Training Schedule (Updated 9/26)

Monday, September 22nd

Lauren Wright

12:30 - 12:45
EEOB 450

Tab 1

WELCOME AND TRAINING AGENDA OVERVIEW

Meet the other new analysts, hear about career development expectations, and review the agenda.

Bing Bradshaw

12:45 - 1:45
EEOB 450

Tab 2

HISTORY, ROLES AND RESPONSIBILITIES OF OMB

Learn why OMB was created, how its roles and relationships to the President have evolved, and how its current responsibilities are reflected in its organization structure.

Adam Goldberg and Regina Kearney

1:45 - 2:45
EEOB 450

Tab 3

INTRODUCTION TO THE OFFICE OF FEDERAL FINANCIAL MANAGEMENT (OFFM)

An overview of OFFM, its primary functions, and financial management.

Tim Young, Kshemendra Paul and Rhonda Hall

2:45 - 3:45
EEOB 450

Tab 4

INTRODUCTION TO THE OFFICE OF E-GOVERNMENT AND INFORMATION TECHNOLOGY

An overview of E-Gov, lines of business, and enterprise architecture.

Tuesday, September 23rd

John Morrall, Jasmeet Seehra, and Kevin Neyland

INTRODUCTION TO THE OFFICE OF INFORMATION AND REGULATORY AFFAIRS (OIRA)

12:30 - 1:30
EEOB 450

An overview to familiarize new employees with OIRA and its primary functions with particular emphasis on the regulatory review process and IT issues.

Tab 5

Jeremy Moon and Elizabeth Erickson

BEING AN EFFECTIVE ANALYST

1:30 - 2:30
EEOB 450

Learn about OMB's Core Competencies and how you are expected to use and develop these skills through specific examples from experienced analysts.

Tab 6

Kathy Stack and Andrew Abrams

ROLE OF THE RESOURCE MANAGEMENT OFFICE (RMO)

2:30 - 3:30
EEOB 450

Learn the functions and responsibilities of RMOs and RMO analysts, including their relationships with other federal agencies and with other offices within OMB and EOP.

Tab 7

Clay Johnson and Dustin Brown

THE PRESIDENT'S MANAGEMENT AGENDA

3:30 - 4:30
EEOB 450

This session will provide an overview of the President's Management Agenda, describe what the goals are, and what has been achieved. It will also acquaint you with the stoplight scoring system and other tools OMB uses to monitor agency performance and help them improve it.

Tab 8

Wednesday, September 24th

Dave Rowe, Jenny Winkler, and Joanne Snow

THE FEDERAL BUDGET FORMULATION PROCESS

12:30 - 1:30
EEOB 450

An overview of OMB's role in developing and advancing the Administration's fiscal policies and the analyst's responsibilities in developing the President's budget request.

Tab 9

Mathew Blum, Cindy Vallina, and Laura Auletta

1:30 - 2:30
EEOB 450

Tab 10

INTRODUCTION TO THE OFFICE OF FEDERAL PROCUREMENT POLICY (OFPP)

An overview of OFPP, procurement policy, and basic information all analysts need to understand procurement issues.

Dave Rowe, Mark Bussow, Julia Wise, and Margie Malanoski

3:30 - 4:30
EEOB 450

Tab 12

RELATIONSHIPS WITH NON-OMB ENTITIES

Learn who you will work with outside of OMB, the boundaries for working with them, their perspective on OMB, and how those relationships will be used.

Thursday, September 25th

Teresa Tancre

10:00 - 11:00
NEOB 10103

Tab 13

BUDGET EXECUTION

An overview of the overarching laws, the roles of the various players in the budget execution process, their role, and the concepts and tools budget analysts need to do their job.

Emily Kornegay, Tom Tobasko and Jim Jukes

1:30 - 3:00
EEOB 450

Tab 14

DEVELOPING AND TRACKING THE PRESIDENT'S LEGISLATIVE PROGRAM

Developing and tracking the President's legislative program is a significant portion of OMB's work. This session will focus on your role in OMB's legislative coordination and clearance responsibilities and your interactions with legislative Affairs (Leg. Affairs), Budget Review Division (BRD), and Legislative Reference Division (LRD) to review and clear materials.

Beth Robinson

3:00 - 4:00
EEOB 450

Tab 15

WHAT TO EXPECT DURING THE TRANSITION

Learn about what to expect during this political transition year.

Rachel Burton and Charlie Sterns

4:00 - 5:00
EEOB 450

Tab 16

CONFESSIONS OF A FIRST-YEAR ANALYST

This is your chance to ask some "second-years" what they wish they had known during their first. Come with some good questions and be ready to hear the blunt truth!

Friday, September 26th

Ken Kelly

9:30 - 10:30
EEOB 450

Tab 17

BASIC BUDGET CONCEPTS

Learn basic budget terms and concepts and how they relate to the President's budget.

Doug Norwood

11:30 - 12:30
EEOB 450

Tab 19

THE ECONOMY AND THE BUDGET

What economic variables affect the budget? Learn how OMB contributes to developing economic assumptions and how those assumptions impact your accounts.

Monday, September 29th

Beth Robinson

12:00 - 1:00
NEOB 10103

Tab 18

DEVELOPMENT OF THE FY 2010 PRESIDENT'S BUDGET

Now that you know how the process should work, learn what really happens and what you can expect for this coming "budget season."

Sarah Lyberg

1:00 - 2:00
NEOB 10103

Tab 20

INTRODUCTION TO FEDERAL CREDIT BUDGETING

Learn terminology, concepts, and analyst responsibilities unique to credit programs.

Stacey Pham, Emily Fort, and Kristi Kubista-Hovis

USING INFORMATION AND TECHNOLOGY TO MAKE YOUR JOB EASIER

2:00 - 3:00
NEOB 10103

Impress your boss and colleagues!! Have the answers to every question. Become resourceful by learning about the vast array of materials available 24/7 with the Intranet and MAX Budget Community. Also, learn about the Budget Formulation & Execution Line of Business and see how it is improving our systems, collaboration, data collection and tracking, human capital, and other aspects of Federal budgeting.

Tab 21

Bing Bradshaw and Stacey Pham

3:00 - 4:00
NEOB 10103

APPORTIONMENTS: THE BASICS

Provides a basic understanding of why accounts are apportioned by examining the legislative history and OMB's role and of the apportionment format and the electronic tools available to analysts and agency staff.

Tab 22

Tuesday, September 30th

Dustin Brown

11:00
-12:00
NEOB 10103

PERFORMANCE IMPROVEMENT INITIATIVE AND THE PROGRAM ASSESSMENT RATING TOOL

This session will provide information on the goals of the Performance Improvement initiative with particular emphasis on the Program Assessment Rating Tool (PART) and how it is used to assess program performance and focus improvement efforts. The session will also cover basic information about the PART instrument, the process, and ExpectMore.gov.

Tab 11

Joe Crilley, Abigail Norris, and Grant Turner

1:00 - 2:00
NEOB 9104

PERSONNEL BUDGETING

Learn what resources are associated with personnel budgeting and what factors to consider when making personnel decisions; present the relationship between personnel budgeting and overall agency management; and show how this information is displayed in the budget.

Tab 23

Kimberly Luczynski

2:00 - 3:00
NEOB 9104

APPROPRIATIONS LAW

An overview of appropriations law that introduces sources, basic terms and concepts, and

preliminary guidance for reviewing appropriations language.

Tab 24

Teresa Tancre

3:00 - 4:00
NEOB 9104

**THE BUDGET INFORMATION REPORTING
CYCLE - PART I**

Why should you care about the budgetary accounting data that agencies are generating? In this session you will learn how the budgetary accounting data relates to the apportionment request you agonized over, the agency budget request you fought so hard for, and the implementation of your agency's program.

Tab 25

Wednesday, October 1st

Sarah Lyberg

2:00 - 3:30
NEOB 8103

USING THE CREDIT SUBSIDY CALCULATOR

Building upon "Introduction to Federal Credit Budgeting," this session provides hands-on application of the Credit Subsidy Calculator, explains the budget and re-estimate process for credit programs, and describes the basic construction of cash flows step by step.

Tab 26

Kevin Sullivan and Latonda Raft

3:30 - 4:30
NEOB 10103

OVERVIEW OF MAX & OTHER DATA SYSTEMS

To acquaint new analysts with OMB systems that support the government-wide development of the President's Budget, appropriations bill tracking, scorekeeping, and other analytical and modeling activities that related to their jobs.

Tab 27

Thursday, October 2nd

Teresa Tancre

1:00 - 2:30
NEOB 8103

**THE BUDGET INFORMATION REPORTING
CYCLE - PART II**

Building upon the Part I session, this session provides hands-on experience with various applications related to budgetary accounting data, including apportionments, 133s, and budget schedules.

Tab 28

Bing Bradshaw and Stacey Pham

2:30 - 3:30
NEOB 6116

Tab 29

CREDIT APPORTIONMENTS

Learn how credit accounts are apportioned, both pre- and post-credit reform.

Friday, October 3rd





Justin Meservie and Gene Emmans

1:00 - 2:00
NEOB 8103

Tab 30

MAX QUERY TRAINING

Familiarize users with MAX Query, and be able to use existing queries and create new queries to meet their particular budget data needs.

Office integration is disabled because WebDAV is either unavailable or it is being blocked by a proxy or firewall. Check again.							
		Name	Size	Creator/ Modifier	Date	Comment	
		Tab 29 - Credit Apportionments.ppt (Checked-out by JENIFER KARWOSKI, click file name for desktop viewing)	1.49 MB	ROSEMARIE CROW	Sep 26, 2008	Tab 29 - Credit Apportionments	Checked-out
		Tab 22 - Apportionments The Basics.ppt	1.84 MB	ROSEMARIE CROW	Sep 26, 2008	Tab 22 - Apportionments The Basics	Options <ul style="list-style-type: none">• Rename attachment• Move attachment• Edit comment• Duplicate• Help
		Tab 18 - Development of the FY 2010 President's Budget.ppt	45 kB	ROSEMARIE CROW	Sep 26, 2008	Tab 18 - Development of the FY 2010 President's Budget	Options <ul style="list-style-type: none">• Rename attachment• Move attachment• Edit comment• Duplicate• Help
			47 kB	ROSEMARIE CROW	Sep 26, 2008	Tab 15 - What to	Options

Writing Reports using Actuate e.RD Pro

This class provides a refresher for folks who have taken the 4-day class, or an introduction to writing reports using e.RD Pro for new developers. It is intended to be the first of a series of e.RD Pro courses covering various programming techniques and report-writing techniques using OMB data.

It includes the following topics:

- Actuate Reporting System product overview and demonstration
- Designing, building and viewing simple reports
- Connecting to databases and custom data sources

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- Working with a report's page layout
- Creating SQL Queries with the Actuate Query Editors
- Understanding report groups -- sections and subsections
- Building sequential and parallel reports
- Understanding libraries and working with components
- Understanding commonly-used Actuate Foundation Class methods
- Debugging a report

Advanced Topics

OMB classes for advanced users. Topics might include:

- Using Actuate's dynamic text control and page sizing features
- Working with Crosstab reports
- Working with Charts
- Creating and using hyperlinks in Actuate reports
- Designing report parameters
- Designing reports using Page-Level Security
- Developing a report for the web
- Designing browser scripting controls
- Designing Actuate XML reports

Creating Actuate Reports using the OMB Framework

This class is for users who are familiar with eRD Pro and would like to see how it works in the OMB environment.

We will walk you through creating reports using the various BRD templates and provide you with an opportunity to create your own reports.

Using SQL

An overview of SQL, primarily focused on writing queries using the SELECT statement.

Understanding the MAX database

An overview of the commonly used views...

e-Report Designer Pro (Actuate 4-day course)

The next Washington DC course will be 4/24/2007 to 4/27/2007.

<http://www.actuate.com/services/education/course-details.asp?courseid=181>

Mentoring

One-on-one mentoring of report writers.

From: Shea, Robert J.
Sent: Wednesday, April 02, 2008 7:00 PM
To: DL-OMB-ALL
Subject: EVALUATION TRAINING WORKSHOP: 4/17 @ 12:30 in 430 EEOB

TRAINING WORKSHOP

**Becoming an effective agent for evidence-based reform in federal programs:
Practical skills and concrete strategies for OMB examiners**

***Thursday, April 17, 12:30-4:00, EEOB 430
Lunch will be provided***

OMB examiners are uniquely positioned to advance evidence-based reforms in federal programs, so as to greatly increase program effectiveness. In U.S. welfare policy, for example, OMB examiners were instrumental in developing the federal government's "demonstration-waiver" policy, which spawned more than 20 large-scale randomized evaluations of state welfare-to-work demonstrations; produced valid, actionable knowledge about "what works"; and helped set the stage for the successful, bipartisan welfare reforms of the 1980s and 90s, leading to major reductions in welfare rolls and gains in employment among low-income Americans. Similar reforms could spark rapid, evidence-driven progress across a broad range of policy areas, such as education, crime and justice, foreign aid, health care financing/delivery, workforce training, child welfare, homeland security, and national intelligence.

We invite you to a workshop for OMB examiners, to provide the practical skills and concrete tools needed to be an effective, entrepreneurial agent for evidence-based reform in the agency programs you work with. The workshop will be led by the Coalition for Evidence-Based Policy – a respected nonprofit, nonpartisan organization sponsored by the Council for Excellence in Government – and will address topics such as:

- How to read a completed (or proposed) program evaluation and readily assess whether it produced (or is likely to produce) valid evidence about program effectiveness;
- How to use apportionment, PART, persuasion, and other tools to engage agencies in a partnership to advance rigorous evaluations and evidence-based approaches;
- How to distinguish the few program models/practices in your policy area that are truly backed by valid evidence from everything else that *claims* to be; and

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- Lessons learned from welfare policy and other concrete examples in which OMB/agencies have used evidence-based strategies to produce important gains in program effectiveness.

To participate, please reserve a seat for yourself by COB Monday, April 14 with Sarah Greer (sgreer@omb.eop.gov). We look forward to seeing you there.

Robert Shea
Office of Management and Budget
(202) 395-4568
rjshea@omb.eop.gov
visit ExpectMore.gov



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503

June 14, 2007

GENERAL COUNSEL

MEMORANDUM FOR ALL OMB EMPLOYEES

FROM: Jeffrey A. Rosen
General Counsel

SUBJECT: Mandatory Ethics Training for All OMB Staff

Office of Government Ethics regulations require that all Federal employees must receive annual ethics training. Employees who file a public financial disclosure report (SF-278) must receive ethics training by a verbal briefing every year. In addition, employees who do not file a public financial disclosure report must receive a verbal ethics briefing once every three years -- the intervening two years are covered by an annual review of written ethics materials.

This year all OMB staff are required to attend a verbal ethics briefing, which will take place on the schedule below. OMB interns and detailees should also plan on attending the training.

OGC will provide a separate briefing at a date and time to be announced for OMB's senior non-career officials which will satisfy the annual ethics training requirement.

Please note that the first session listed below is intended for new supervisors (supervisors with less than three years of managerial experience.) For the remainder of the training, we request that staff, to the extent possible, follow the schedule below (by first letter of last name) to ensure that seating is available for all attendees. These sessions will be held in Conference Room 5104 of the New Executive Office Building (NEOB) and in Room 450 of the Eisenhower Executive Office Building (EEOB).

Place: Room 5104, NEOB

<u>Day</u>	<u>Date</u>	<u>Time</u>	<u>Attendees</u>
Tuesday	June 26, 2007	3:00 p.m. - 4:00 p.m.	New Supervisors
Wednesday	June 27, 2007	2:00 p.m. - 3:00 p.m.	A - B
Thursday	June 28, 2007	2:00 p.m. - 3:00 p.m.	C - E

Place: Room 450, EEOB

Tuesday	July 10, 2007	3:00 p.m. - 4:00 p.m.	F - J
Wednesday	July 11, 2007	3:00 p.m. - 4:00 p.m.	K - O
Thursday	July 12, 2007	3:00 a.m - 4:00 a.m.	P - Z

Place: Room 5104, NEOB

Wednesday	July 18, 2007	2:00 p.m. - 3:00 p.m.	Open
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Place: Room 450, EEOB

Wednesday	July 19, 2007	4:00 p.m. - 5:00 p.m.	Make-up
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As you know, OMB is committed to maintaining the highest standard of compliance with ethics laws and regulations. Each employee needs to take the appropriate steps to attend one of the sessions listed above. Please do not hesitate to contact Stuart Bender, OMB's Designated Agency Ethics Official at 395-7533, Mac Reed, OMB's Alternate Designated Agency Ethics Official at 395-3563, or me at 395-5044, if you have any questions regarding ethics training or ethics rules and regulations generally.

Thank you.

From: Wright, Lauren E.
Sent: Tuesday, February 20, 2007 3:38 PM
To: DL-OMB-DADs; DL-OMB-Branch Chiefs
Cc: Warner, Sharon A.; Moone, Jamesa C.
Subject: Summer Training opportunities - Writing that Works and Powerful Presentations

I am pleased to announce that we will once again be offering the Writing that Works and Powerful Presentations workshops this year. Course dates, descriptions, and costs are given below. Please submit your nominations to me, in priority order and date requested, for each individual. Your nominations are due to me by April 6, 2007. Please remember, space is limited, so the earlier you get your nominations to me, the more likely it is that your staff will be included!

Writing that Works (three full days, one hour of personal coaching on third day)

The cost per participant is ^{b2} [REDACTED] - central funds will pay half and divisions will be charged ^{b2} [REDACTED] per participant

Session 1 - May 8-11 - 9:00 a.m. to 5:30 p.m.

Session 2 - June 12-15 - 9:00 a.m. to 5:30 p.m.

OVERVIEW - WRITING THAT WORKS

You get more from our training than just a great class. Committed to your success, we work closely with you afterward to produce lasting results. Here's how we usually do it:

- **Two days of classwork for 10-20 professionals.** Illustrations and exercises come from office writing you send ahead. This extensive tailoring helps you learn faster and remember longer.
- **Personal coaching right after class.** You meet with the instructor for 45 minutes to discuss your own writing, which he edits in advance. This one-on-one training reinforces the classwork and treats your special needs and interests as no class can.
- **Personal coaching long after class.** For fully six months after your class, send us your writing for our comments. Email Express™ is a free and easy way for you to keep making progress.

Your class and coaching won't dwell on grammar or punctuation (unless you make us mad). They'll focus instead on reaching more elusive goals:

- Content that's right for the audience and purpose
- Organization that gets to the point and makes navigation easy
- Wording that's clear, concise, and convincing

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Different occupations approach these goals differently. Choose the course at the top that's best for you. If you don't see the one you are looking for, just ask.

Powerful Presentations – (two full days) limited to 9 participants for each session

b2 The cost per participant is ^{b2} [REDACTED] - central funds will pay half and divisions will be charged [REDACTED] per participant

Session 1 – May 15-16 – 9:00 a.m to 5:30 p.m

Session 2 – August 7-8 – 9:00 a.m. to 5:30 p.m.

OVERVIEW – POWERFUL PRESENTATIONS

Some people seem to have a gift for making impressive business presentations. This course is for the rest of us, those who aren't naturals at designing and delivering office briefings. You'll learn the secrets of successful presentations and apply them in a supportive setting. The next time you present, *you* will seem to have a gift for it.

How will I benefit from Business Presentations That Work™?

You'll learn how to **design** a presentation:

- Use our sure system to analyze your purpose and audience
- Organize so you start fast and stay focused
- Persuade by choosing the best appeals and support
- Clarify by knowing when and how to use PowerPoint

You'll learn how to **deliver** a presentation:

- Hold attention by using a clear, animated, conversational style
- Win over the wavering by fielding tough questions confidently
- Get rid of the jitters and, um, distracting ticks

What will I take away from this seminar?

Besides the knowledge that you are a powerful presenter, you'll take with you:

- Our 16-page guide, *Business Presentations That Work*
- A videotape of yourself giving several presentations, guaranteed to show you getting better and better

[illegible]

7	Current events series
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BRD Training Timeline

Winter **Fall (September-November)**

- OMB Staff reviews agency budget requests in relation to the president's priorities, program performance, and budget constraints
- President, based on recommendations by the OMB director, makes decisions on agency budget requests. OMB provides passback.

Relevant Courses:

- MAX Database
- MAX Query
- Actuate — *Art Stigle*
- Intro to SQL
- Advanced SQL
- Table Editor
- Print Management Center
- Reporting
- Process
- Data Entry

Winter (December-February)

- Agencies may appeal decisions on budget requests.
- Agencies prepare and OMB reviews budget justifications.

Relevant Courses:

- Budget Execution

Spring (March-May)

- OMB issues budget guidance to agencies.
- Agencies begin developing budget requests.

Relevant Courses:

Summer (June-August)

- OMB issues circular A-11.
- Agencies submit budget requests.
- Intro to Continuing Resolutions
- Advanced Continuing Resolutions

Relevant Courses:

- Basic Budget Concepts
- Advanced Budget Concepts
- About BRD
- Appropriations Language
- Bill Tracking
- Scoring Rules

McLaren, Christopher

From: McLaren, Christopher

Sent: Friday, November 14, 2008 2:03 PM

To: DL-OMB-ALL

Subject: Training Blast! Upcoming Nov & Dec Training Opportunities

OMB Training Blast!

Below is a list of upcoming training opportunities for OMB staff.

Technical Trainings

- Technical Instructions for Writing Appropriations Language (11/20 – 11 to 12:30; NEOB 10103 – signup required)
- **NEW SESSION ADDED!** Technical Instructions for Writing Appropriations Language (12/01 – 10 to 11:30; NEOB 10103 – signup required)

Lunch-&-Learns

- BRD Brownbag: Economic Assumptions with Patrick Locke (11/19 – 12:30 to 1:30; NEOB Eatery)
- EOP Brownbag: Stress Factors in the Workplace; Coping with Conflict (12/10 – 10 to 11:30; 1800 G ST)

Community Trainings

- MAX Community Training for Beginners (11/17 – 10:30 to 12; NEOB 8103 – signup required)
- MAX Community Training for Beginners (11/20 – 1:30 to 3; NEOB 8103 – signup required)
- MAX Advanced Community Training (12/11 – 10:30 to 12; NEOB 8103 – signup required)

External Trainings

- AABPA Fall Symposium – Navigating Transition, Leading Change (11/18 – registration required)
- Tax Reform's Challenges and Opportunities (12/05 – 8:45 to 4:30; Brookings Institute – registration required)

Visit OMB Training for links to past presentations and resource materials! **And, need refresher training for the upcoming budget season?** Check out BRD's enhanced presentations!

Are you aware of a training opportunity not included on the list above? Send me an email to include your event in the next Training Blast!

Full event details listed on the Master Training Calendar.

Technical Instructions for Writing Appropriations Writing: OMB's General Counsel Office staff present the first in a series of training sessions on legal drafting and interpretation. The first session focuses on writing appropriations language for the President's budget. Later sessions address appropriation language in budget amendments and continuing resolutions. Topics include rules for punctuation, provisos, procedure for

11/21/2008

insertion/deletions, and the period of availability. Sign-up is required and each session is limited to 40 participants.

Economic Assumptions Brown Bag Lunch: Patrick Locke will lead a discussion on the development of economic assumptions and how they relate to the economy and budget.

MAX Community Training for Beginners: The beginner's class covers the basics such as how to add and edit pages, restrict pages, move pages, and add attachments. Advanced classes are currently full, but will be available in early 2009. (Note: This training is for the MAX Community. It **does not** cover A-11 or any of the other MAX applications.)

MAX Advanced Community Training: The advanced class covers more advanced features such as macros, Direct Edit, consolidate tables and text, etc. (Note: This training is for the MAX Community. It **does not** cover A-11 or any of the other MAX applications.)

Stress Factors in the Workplace: Coping with Conflict: Offered through OA's Employee Assistance Program, monthly sessions focus on work/life balance and are held at 1800 G Street for all EOP staff.

AABPA Fall Symposium – Navigating Transition, Leading Change: The AABPA Fall Symposium takes place Tuesday, 11/18 at the Capital Hilton Hotel (16th, between K and L Streets NW). The theme of the symposium in this year of transition to a new administration is: Navigating Transition, Leading Change. Registration and attendance fees are required.

Tax Reform's Challenges and Opportunities: Brookings, the Urban-Brookings Tax Policy Center (TPC) and Tax Analysts will co-host a day-long forum that explores timely policy recommendations to the incoming president and his transition team. Registration is required.

Course	Training Description	Subject Matter Experts	Proposed Delivery Strategy
	Intro		
1. Negotiating and Resolving Conflict	Negotiations and dispute resolution, tailored to meeting OMB's unique situations; for example, a OMB examiner negotiating with an Asst. Secretary	Experienced Examiner; DAD; and/or Branch Chief(s)	Classroom or BB
2. Advanced Budget Concepts	Refresher and advanced course in budget concepts for 2+ year analysts Deeper understanding of collections/receipts, deficit/surplus, Federal debt, budget authority, obligations, outlays and balances.	Ken Kelly Gail Zimmerman	Classroom Online Refresher (Enhanced Presentations)
3. Appropriations	a) Series of technical instructions for writing appropriations language: (1) President's Budget; (2) Amendments; (3) CR; and (4) Other – TBA	Kimberley Luczynski	Classroom
	b) Appropriations Law training after spending time with GC Office staff to tailor training to meet OMB's specific needs.	Kimberley Luczynski Steve Aitken Management Concepts	Classroom
4. Personnel Budgeting	How to review S&E budgets How to budget to accounts that are Administrative, or otherwise are largely concerned with FTE levels	Grant Turner, Melissa Kline, Abby Norris, Joe Crilley Experienced S&E Examiners (Dan LaPlaca, Chantel Boyens)	Classroom / Q&A Online Refreshers
5. Federal Credit Budgeting	Basic introduction to credit budgeting Discussion of the basics of credit programs and an overview of the Credit Reform Act. Detailed analysis of complex credit programs	Sarah Lyberg Courtney Timberlake	Online Refresher (Enhanced Presentations) Classroom; BB
6. Reviewing Regulations	Provide step-by-step instructions on how to review regulations.	OIRA Staff (Bridget Dooling, Jasmeet Seehra, Dominic Mancini)	Online Classroom; BB