

# FY08 Operations Management Catalog



CARE USA  
151 Ellis Street Atlanta, GA 30303



Register online at <http://www.careacademy.org>

# Operations Management

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## A Note of Welcome



Colleagues,

It is my pleasure to present to you CARE's second Operations Management course catalog.

The Operations Management catalog contains a listing of courses available to CARE staff around the world in fiscal year 2008 and is designed to cover operations management subjects like procurement, finance, administration, risk reduction and similar subjects vital to operational excellence. Taking opportunities to strengthen our operations management skills will enable us to achieve greater impact and excellence in all aspects of our work.

We remain steadfast in our hope that this catalog will be a useful tool to help staff around the world improve their operations management skills. We also hope that our courses will continue to build knowledge and skills needed to help staff pursue career development and advancement goals within CARE.

Thank you for making the commitment to learn and grow.

Regards,  
Joe Iarocci  
Senior Vice President, Finance  
& Chief Financial Officer

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### BudgetMate HQ

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This two-hour course is designed to provide training on the latest version of BudgetMate HQ to assist in the preparation of annual budgets.

#### Track

- Finance

#### Class Size:

- 12 Participants

#### Who Should Attend?

- CARE staff that prepare HQ and US Field Office budgets

#### Class Prerequisites:

- Basic knowledge of Microsoft Excel

#### Class Date(s):

March 19, 2008  
March 20, 2008

#### Class Location:

Atlanta, GA  
Atlanta, GA

#### Class Duration:

2 hours  
2 hours

#### Instructor(s)/Facilitator(s):

TBD

#### How will you benefit?

Upon completion of this course, students will be able to:

- Understand how to input budgets for projects with one or more fund codes.
- Understand how to input salary and benefit information for Atlanta staff, U.S. Field Office staff, and vacant positions.
- Understand how to prepare annual budgets using Budget-Mate software.

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### DA\$H

This interactive one-hour course will teach you how to navigate and use the many functions of DA\$H. DA\$H is designed to help you better understand CARE's global financial picture, including how CARE receives and spends money.

#### Track

- Finance

#### Class Size:

- 10-20 Participants

#### Who Should Attend?

- All CARE Staff

#### Class Prerequisites:

- None

#### Class Date(s):

December 5, 2007

May 28, 2008

#### Class Location:

Atlanta, GA

Atlanta, GA

#### Class Duration:

1 hour

1 hour

#### Instructor(s)/Facilitator(s):

Sarah Ralston (Organizational Performance Mgmt)

Lawanda Johnson-Graham (Organizational Performance Mgmt)

Jeff Yaschik (Director, Organizational Performance Mgmt)

#### How will you benefit?

Upon completion of this course, students will be able to:

- Navigate CARE's current and quarterly financial information.
- Understand classification terms used to monitor CARE's income and expenses.
- Understand CARE's financial progress against current and previous year budgets.

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### Essentials of Strategic Support (E-learning)

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This on-line course is designed to provide introductory training on seven critical elements of operations management which include Procurement, Financial Management, Procurement, and Cash Management.

#### Track

- Finance

#### Class Size:

- Not applicable. This is an online or CD-ROM course

#### Who Should Attend?

- Country Directors (CDs), Assistant Country Directors (ACDs)
- Senior country office managers that are new to the position and have limited operational management experience

#### Class Prerequisites:

- None

#### Class Date(s):

Available online

#### Class Location:

Online or CD-Rom

#### Class Duration:

5-7 hours

#### Instructor(s)/Facilitator(s):

Not Applicable.

#### How will you benefit?

Upon completion of this course, students will be able to:

- Understand and interpret critical finance reports.
- Understand tools that can improve operations support performance in the country office.
- Understand key issues about Shared Program Costs and budgeting.
- Understand Legal and IT issues that are important to senior country office managers.

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### Foundation in Operations for Senior Managers

This highly interactive course is taught through exploring relevant scenarios that take place at a fictional CARE country office. This course is designed to assist country office senior managers in gaining necessary skills, knowledge, and understanding of the critical elements of operations support. Gained knowledge will assist participants in applying CARE and donor policies and procedures.

#### Track

- Finance

#### Class Size:

- 24 participants

#### Who Should Attend?

- Country Office senior managers
- Country Directors (CDs) and Assistant Country Directors (ACDs) that are new to CARE or the position and have limited operations support experience
- Staff nominated by Regional Directors to participate

#### Class Prerequisites:

- Essentials of Strategic Support e-learning course
- Fundamentals of Finance for Non-Finance Managers (recommended)

#### Class Date(s):

April 14 - 18, 2008

#### Class Location:

TBD

#### Class Duration:

5 days

#### **Instructor(s)/Facilitator(s):**

Amany Al Hadka (Manager, Global Operations Improvement Unit)

Charlie Danzoll (Director, Global Operations Improvement Unit)

Jeff Yaschik (Director, Organizational Performance Management)

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### Foundation in Operations (Cont'd)

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#### How will you benefit?

Upon completion of this course, students will be able to:

- Apply basic knowledge gained through Essentials of Strategic Support training.
- Understand how to better integrate Program and Operations Support teams to enhance accountability and organizational performance.
- Assess and minimize risks in Procurement, IT, Asset Management, and Cash Management.
- Improve stewardship of donor resources through a better understanding of grants and contracts and sub-grant management.
- Understand how to manage the balance between financial viability and programmatic relevance in the country office.

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### How to Hire a Consultant

This short but informative course is designed to assist CARE Managers with the consultant selection and hiring process.

**Track**

- Procurement

**Class Size:**

- 30 participants

**Who Should Attend?**

- Hiring Managers, Administrative Support Staff

**Class Prerequisites:**

- None

**Class Date(s):**

November 15, 2007

March 27, 2008

**Class Location:**

Atlanta, GA

Atlanta, GA

**Class Duration:**

2 hours

2 hours

**Instructor(s)/Facilitator(s):**

Rosemary Sicay-Perrow (Supervisor, Procurement)

**How will you benefit?**

Upon completion of this course, students will be able to:

- Understand how to process contracts through CARE HQ Procurement.
- Understand CARE's liability and exposure when a corporate or individual consultant is hired.
- Ensure contracts comply with CARE's legal, tax, and accounting regulations.
- Negotiate with consultants on key terms and rate of pay.
- Create a detailed Scope of Work (Schedule A) with clear deliverables.

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### Nuts & Bolts of Competitive Bidding

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This eight day workshop contains a thorough overview of key components of the competitive bidding process from relationship building with donors and potential partners to final proposal submission. Participants will engage in hands-on activities, case studies, and small group work to gain experience in competitive bidding. Participants will also design action plans for follow-on activities that can be used to share their learning.

#### Track

- Grants & Contracts

#### Class Size:

- 30 participants

#### Who Should Attend?

- Sector Coordinators, Assistant Country Directors (ACDs), Program Design personnel, and Proposal Development personnel
- Staff whose job descriptions include mobilizing resources from the US Government

#### Class Prerequisites:

- CARE CBU– Competitive Bids Overview e-learning course (available on the CARE Academy)

#### Class Date(s):

November 5 - 14, 2007

#### Class Location:

Atlanta, GA

#### Class Duration:

6 full days +  
2 half days

#### **Instructor(s)/Facilitator(s):**

Melanie Chen (Director, Competitive Bids Unit (CBU))  
Jesse Rattan (Proposal Development Coordinator, CBU)  
Ana de los Reyes (Cost Proposal Business Specialist, CBU)  
Joe Lumpkin (New Business Liaison, CBU)

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### Nuts & Bolts (Cont'd)

#### **Instructor(s)/Facilitator(s) Continued:**

Tricia Siaso (Recruitment Specialist, CBU)

Sarah Gardiner (Proposal Development Officer, CBU)

Barbara Wallace (Senior Director of Development, Foundations Unit)

#### **How will you benefit?**

Upon completion of this course, students will be able to:

- Understand the key steps involved in the competitive bidding process.
- Understand how to prepare a winning cost and technical proposal in response to competitive solicitations from the US Government.
- Understand how to form effective teams to respond to solicitations.
- Understand how Headquarters and CO staff can interact to respond to bids.
- Gain some familiarity with other aspects of resource mobilization and donor relations.

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### US Govt Rules & Regulations - Introduction

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This 6-hour training session delivered over two days is designed to highlight important rules and regulations issued by the United States government for grants, cooperative agreements, and contracts.

#### Track

- Legal

#### Class Size:

- 30 participants

#### Who Should Attend?

- Finance, Program and Audit personnel desiring training in USG rules and regulations. (By invitation)

#### Class Prerequisites:

- A general understanding of regulations
- Practical experience in US government funded grants, cooperative agreements, and contracts

#### Class Date(s):

January 24-25, 2008

#### Class Location:

Atlanta, Georgia

#### Class Duration:

6 hours

#### Instructor(s)/Facilitator(s):

Eric Johnson (Associate General Counsel and Compliance Officer)  
Cyril Alaras (Manager, Program Support)

#### How will you benefit?

Upon completion of this course, students will be able to:

- Understand the overall regulatory and legal scheme related to funding received from the US government (highlighting key differences with other major national donors).
- Recognize key programmatic areas and costs that are ineligible or require prior approval from the US government.

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### 13 US Govt Rules & Regulations - Introduction (Cont'd)

#### How will you benefit?

Upon completion of this course, students will be able to:

- Incorporate source, origin and nationality requirements into programmatic and procurement tasks.
- Understand requirements relating to subgrant management and monitoring.

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### US Govt Rules & Regulations - Joint PVO Training

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This interactive information exchange workshop is jointly facilitated by Private Volunteer Organizations (PVOs) represented by CARE, Mercy Corps, Catholic Relief Services, ADRA, and World Vision. This five-day session is designed to highlight important rules and regulations issued by the United States government for grants, cooperative agreements, and contracts.

#### Track

- Legal

#### Class Size:

- 8 to 10 CARE participants

#### Who Should Attend?

- Management level Finance, Program, or Audit staff

#### Class Prerequisites:

- A general understanding of regulations
- Practical experience in US government funded grants, cooperative agreements, and contracts

#### Class Date(s):

Oct. 29 - Nov. 2, 2007  
May 2008

#### Class Location:

Cape Town, South Africa  
Bangkok, Thailand

#### Class Duration:

5 days  
5 days

#### **Instructor(s)/Facilitator(s):**

Eric Johnson (Associate General Counsel and Compliance Officer)  
Representatives from PVOs listed above

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### Joint PVO Training (Cont'd)

#### How will you benefit?

Upon completion of this course, students will be able to:

- Understand the overall regulatory and legal scheme related to funding received from the US government (highlighting key differences with other major national donors).
- Recognize key programmatic areas and costs that are ineligible or require prior approval from the US government
- Learn about practices in use at participating PVOs.
- Benchmark with participating PVOs in key regulatory and policy areas.
- Incorporate source, origin and nationality requirements into programmatic and procurement tasks.
- Understand requirements related to subgrant management and monitoring.
- Recognize USAID's internal rules, policies, and practices in managing recipient organizations like CARE.

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### Instructors

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**Amany Al Hadka**

Manager, Global Operations Improvement Unit  
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**Cyril Alaras**

Manager, Program Support  
alaras@care.org

**Melanie Chen**

Director, Competitive Bids Unit  
mchen@care.org

**Charlie Danzoll**

Director, Global Operations Improvement Unit  
cdanzoll@care.org

**Sarah Gardiner**

Proposal Development Officer, CBU  
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**Lawanda Johnson-Graham**

Manager, Organizational Performance Management  
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**Eric Johnson**

Associate General Counsel  
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**Joe Lumpkin**

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**Sarah Ralston**

Manager, Organizational Performance Management  
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**Jesse Rattan**

Proposal Development Coordinator, CBU  
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**Ana de los Reyes**

Cost Proposal Business Specialist, CBU  
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**Tricia Siaso**

Recruitment Specialist, CBU  
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**Rosemary Sicay-Perrow**

Supervisor, Sr. Procurement Officer  
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**Barbara Wallace**

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**Jeff Yaschik**

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