

TRAINING AND DEVELOPMENT SOLUTIONS

Subject Matter Expert Guidelines

Training and Development Solutions - Contact Information

Contact Name	Phone	E-mail Address
Department Administration		
Julia A. Dozier, Director Economic Development and Contract Education	925-485-5234	jdozier@clpccd.org
Business Development		
MariAnn Fisher, Marketing and Sales Manager	925-485-5239	mfisher@clpccd.org
Chris Paczocha, Program Coordinator	925-485-5202	cpaczocha@clpccd.org
Program Development		
Julia A. Dozier, Director	925-485-5234	jdozier@clpccd.org
Shari Friedel, Senior Program Coordinator	925-485-5219	sfriedel@clpccd.org
Location/Mailing Address:	Training and Development Solutions Chabot-Las Positas Community College District 5020 Franklin Drive, Pleasanton, CA 94588	
Department Fax:	925-485-5211	

Purpose of The Subject Matter Expert Guidelines Manual

This handbook has been created as a resource for you. It outlines the interactions and expectations between Training and Development Solutions (TDS) and the Subject Matter Expert (SME), from our initial interview to how you are paid. It also covers the special services that are available to you as a SME of TDS.

Table of Contents

TDS Contact Information	i
Introduction	1
PRIOR TO SERVICE DELIVERY OR CONSULTING ENGAGEMENT	2
HANDOUTS AND COURSE MATERIALS	4
AT THE SITE	5
<i>The Basics</i>	5
AFTER THE ASSIGNMENT	6
<i>The Process</i>	6
INDEPENDENT CONTRACTOR	7
<i>Preparing your invoice</i>	7
PROFESSIONAL SPECIALIST	8
<i>Preparing your timesheet</i>	8
SME PROGRAMS AND SERVICES	9
SME-TOC SERVICES	10
THE MARKETING PARTNERSHIP PROGRAM	11



Welcome to Team TDS

As a Subject Matter Expert for Training and Development Solutions, you are a member of a team dedicated to the best quality and service that can be provided. It is your expertise that allows us to deliver the highest value training and services to our clients.

Who we are

Training and Development Solutions (TDS) was established as the contract services division within the Economic Development department. The original contract services program at CLPCCD commenced operations in 1990.

We operate primarily in the District service area (Livermore; Pleasanton; Dublin; Castro Valley; San Leandro; San Lorenzo; Hayward; and Union City).

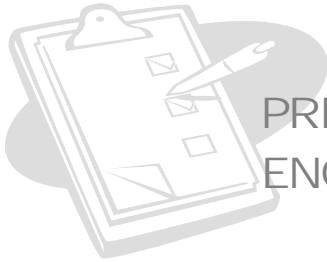
What we do

We create and deliver customized training solutions and performance improvement programs for our clients. See our website for a sample of the training and consulting services we provide at www.tdsolutions.org. Services are usually delivered on-site, at the business' convenience.

How we do it

We contract with you, our Subject Matter Experts (SME). You come from business, industry, consulting firms, colleges and anywhere else the expertise required resides. Together, we generate a solution to meet the needs of our clients.

As a self-funded entity, charged with generating income to cover our costs, the department generates most of its revenue from contracts or agreements directly paid for by the employer. Occasionally, program costs may be offset by other funding sources, including the state Employment Training Panel (ETP), grants, and partnerships with public and private entities.



PRIOR TO SERVICE DELIVERY OR CONSULTING ENGAGEMENT

Step 1: Initial Interview with Training and Development Solutions

You will be interviewed by either the Business Development or Program Development Manager. At the time, you will be provided with an Instructor/Consultant Agreement. The agreement must be signed and returned to TDS before you can be contracted for any engagement.

Step 1A: Determining Hiring Classification

Professional Specialist

If you have been an employee of the Chabot-Las Positas Community College District (or of either campus), you will be processed as an employee of the District.

Independent Contractor

If you have never been an employee of CLPCCD (or of either campus) and are self-employed, you may qualify as an independent contractor. If you are incorporated, you would also fall under this category.

Step 2: Availability/Interest/Qualifications

When a service delivery opportunity arises, a Manager or Program Coordinator will contact you. Our initial call will be to establish your interest and availability and/or to clarify your qualifications. This is not a verbal commitment to you to use your services. If you are a good match, you will be asked to interview with the client.

Step 3: Meeting with the Client (aka, the Interview)

As with any job interview, you will not be reimbursed for meeting with the client.

Interview procedures:

1. The Program Coordinator will contact you to schedule the interview with the client.
2. Please be sure to show up to the client's office 10-15 minutes early. Make sure to give yourself enough travel time in case you have trouble finding the location.
3. Please do not give the client your contact information or contact the client directly after the initial meeting. We will act as the facilitator for the client's needs, and we will make sure to keep you well informed as the SME selection process progresses.

4. Please bring some sample materials for the client and come prepared to discuss the solution being considered. In most cases, you will be provided an outline with the major topics for discussion. Remember, information gathered during this interview will be used to customize the solution to fit the client's needs.
5. Do not discuss compensation or financial details with the client.
6. Contact your Program Coordinator after the interview.

Step 4: Instructor/Consultant is selected

Do not call the client directly. If you are selected, the Manager or Program Coordinator will contact you. You may request course materials or any equipment needs at this time.

Step 5: Paperwork to hire you

If you are new to TDS, you will be asked for your Social Security Number or Federal Tax ID Number. If you have been a vendor or employee of CLPCCD, your "W" number is preferred.

Professional Specialist

Your name will be submitted to the Board of Trustees at the next available Board Meeting. Once approved, you will be responsible to submit a monthly timesheet and the appropriate documentation to your Program Coordinator when you have an active assignment.

Independent Contractor

We will submit a Contract for Services that defines the scope of the services being delivered. The process requires obtaining your signature, and the signatures of the hiring Manager, and designated CLPCCD Administrators. When the Contract for Services has been signed by all parties, a copy will be sent to you. A Purchase Order (PO) will also be established and a copy will be mail to you separately. Your vendor number ("W" number) and PO number will be indicated.

You will be responsible for submitting an invoice and appropriate documentation to the your Program Coordinator after the service has been delivered. If the service delivery is for an extended period of time, a schedule may be arranged (monthly, quarterly, etc.)



Step 6: Service delivery is scheduled

The Program Coordinator is the main contact. He/She will handle all logistics with the client and the instructor.



HANDOUTS AND COURSE MATERIALS

Curriculum Development

Hours for curriculum development are negotiated in advance. The general guideline is one hour of curriculum development for every two hours of training. One exception to this rule is the presentation of a training topic to the same client at the same site. In this case, no additional curriculum development time will be provided. If you have any questions regarding the number of hours, rate, etc., please contact your designated Manager.

The purchase/rental of materials or equipment must be arranged/negotiated in advance with the Coordinator or Manager. If you purchase or rent materials or equipment without authorization, you will not be reimbursed.

Course Materials

Please refer to the SME-TQC Services in the appendix for material expectations. To provide adequate time to process your materials, deliver/e-mail them to TDS ten working days before the start date of assignment. *E-mailed files are preferred.* Materials must be in a Microsoft Office format (Word, PowerPoint or Excel).

You are responsible for picking up your materials at the District Office. Call your Program Coordinator to confirm the date they will be ready.

Making Your Own Copies

If you choose the make copies on your own, you will not be reimbursed. You will also need to request the sign-in sheet and evaluation form templates for copying from the Program Coordinator. These forms must be completed and returned to TDS for you to receive payment for your services.

Please e-mail a set of your course materials to the Program Coordinator before the start of assignment. We are required keep a set of your materials on file. If you have mixed media (hard copy and digital), please arrange with the Program Coordinator to provide a complete set.

Materials

When we prepare your materials, you will receive the following:

Basic/Standard

- Sign-in sheet(s)
- Evaluations (allow time at the end of each session)
- Handouts
- Directions to the site, if needed

If you do not receive any of the above, please let your Program Coordinator know.

Occasionally, additional materials are requested/required and provided depending on the needs of the client, the contract or the SME.

- Equipment/Multimedia Rental (Video/DVD/Projector, etc., as requested, unless provided at the site)
- Certificates (as requested, please sign and date certificates, then distribute at the end of class)
- Blank Training Summary sheet (please fill in requested information)
- Post-test (as required)
- Timesheet (if you are a Professional Specialist)

If you do not receive any of the above and think you should have, please check with your Program Coordinator.



Please arrive at the site a minimum of 15 minutes before the assignment is to begin. If you are running late, please call your Manager or Program Coordinator. The exception would be if it is before normal business hours. Unless you have been provided a TDS Manager's or Program Coordinator's cell phone number, call the site contact person and then call our office.

Equipment

If you are using equipment (projectors, VCRs, etc.), please allow extra time for set-up.

Sign-in Sheet

Place the sign-in sheet near the entrance on a table or desk with a couple of pens for the participants to use when they sign-in. Remember to pick it up at the end of session. If your sign-in sheet has an instructor's signature line at the bottom, please sign it.

Post Tests

If a post test is required, please remember to have the participant take the test, then review and grade with the participants. This will reinforce their knowledge before they leave since we will not be meeting with them to discuss their test scores. Collect the post tests.

Evaluations

In the last five minutes of the session distribute the evaluations, have the participants fill them out and collect them as the students leave. Evaluations are important because they provide feedback not only for the client but also for TDS and the instructor. When you turn in the evaluations, they are compiled onto a summary sheet. The original evaluations, evaluation summary and the sign-in sheet will be provided to the client after the service delivery has been completed. Long-term assignments, such as English as a Second Language, may require post assessment of the participant. In this case, a post assessment is provided instead of an evaluation.



AFTER THE ASSIGNMENT

The Process

All materials and request for payment for the current month must be received no later than the 15th of the following month. If your materials are received after the 15th, your payment will be delayed. Equipment and rentals must be returned to us the next business day after the session.

At the completion of your assignment, return the following:

- **Completed Sign-in sheet(s) and Evaluations**
- **Any other items such as:**
 - Equipment/Multimedia Rental (Video/DVD/Projector, etc)
 - Training Summary
 - Graded Post-Test
 - Post-Test Key
 - Attendance Record and Grade Roster
- **Request for payment**
 - Invoice (if you are an Independent Contractor), or
 - Timesheet (if you are a Professional Specialist)

Note: Your timesheet or invoice will not be processed until the required documentation has been received. A delay in returning equipment may also delay the processing of your payment request.

Returning Equipment

When you return equipment, it must be presented to a Training and Development Solutions staff member. Never leave it in the main lobby or at an empty desk/cubicle. We have had equipment taken from unattended workspaces. If you are returning equipment around lunch hour, please call ahead to verify that a staff person will be here to receive the equipment.



INDEPENDENT CONTRACTOR

Preparing your invoice

The invoice should include the following information:

- Invoice Date
- Your Name
- Company Name (if applicable)
- Mailing Address
- Purchase Order #
- “W” number (check Purchase Order or call Program Coordinator)

Invoice Detail (*see below for explanation*)

- Indicate client name – *for multiple clients, consolidate assignments by client.*
- Date of assignment
- Description of hours – assignment name/topic, type of hours billed for such as training or curriculum development (*Hours designated as other than training must be approved in advance by the Manager.*)
- # of hours by type and date
- Hourly rate/rate per session - provide # of students, if your rate varies depending on class size

Example of invoice detail for a single client

12/3/04	Team Building	curr dev	2 hrs	\$45.00	\$90.00
12/7/04	Team Building	training	4 hr	\$50.00	\$200.00
Invoice Total					\$290.00

Mail or deliver your invoice with the corresponding materials (if you have not already sent them in) to the address listed below:

Your Program Coordinator's Name
 Training and Development Solutions
 CLPCCD
 5020 Franklin Dr.
 Pleasanton, CA 94588



PROFESSIONAL SPECIALIST

Preparing your timesheet

As a Professional Specialist, you are considered an employee of the District. Therefore, you are paid once a month. Payments are made usually no later than the 1st of the month following submittal of timesheet in the previous month. We must receive your timesheet by the 15th. If you submit your timesheet late, your check could be delayed by a minimum of two months. Direct deposit is available. The timesheet is available on our website.

Fill out the following sections of the time sheet:

- **PAY TO** – fill in requested information
- **TOTAL DUE** – fill in rate and hours, then calculate total
- **TYPE OF SERVICE** – check box marked **Professional Specialist**
- **PROGRAM/COMPANY NAME** – enter company name and the assignment topic.(i.e., ABC Company – Team Building)
- **SERVICE RECORD** – indicate date, hours, and number of students present. Indicate type of hours if other than training i.e., consultation or curriculum development. (*Hours designated other than training must be approved in advance by the Manager.*)
- **SIGNATURE OF INSTRUCTOR/PERSONNEL** – sign form

Do not fill out the bottom section. We complete the remainder of the form. Mail your timesheet with the corresponding materials (if you have not already sent them in) to the address listed below:

Your Program Coordinator's Name
Training and Development Solutions
CLPCCD
5020 Franklin Dr.
Pleasanton, CA 94588





SME-TQC SERVICES

Training and Development Solutions offers word processing, design, duplication and assembling services for our subject matter experts as it relates to our contracted assignment.

Basic Services (No Fee)	Additional Services (Fee)
<ul style="list-style-type: none"> • Duplicating 	<ul style="list-style-type: none"> • Word Processing
<ul style="list-style-type: none"> • Assembling 	<ul style="list-style-type: none"> • Design and Layout

Expected Level of Quality for Service Delivery Materials

1. Course materials should be first generation copies
2. Pages should be clean (no scuffs, erasure marks, corrections, dirt, etc.)
3. No handwritten page numbers
4. Free from typographic and spelling errors
5. No more than three different fonts used
6. Minimum font size for body text is 10
7. One inch margin minimum on left-hand side of page

Unless it is indicated otherwise, our standard copying for handouts is white paper, double-sided, collated, and stapled. If the client requests that the materials be placed in a binder, we will hole-punch instead of staple. Training and Development Solutions will provide a cover sheet.

Formatting Materials

E-mailed files are preferred. If you send your materials by e-mail, they must be in a Microsoft Office format (Word, PowerPoint or Excel) and sent as an attachment. Indicate any preferences you may have regarding the color of paper, stapled, collated, etc.

PowerPoint

If you are using a PowerPoint presentation, please indicate the number of slides you would like to have on each page of the handout. Please indicate any preferences you may have regarding the color of paper, stapled, etc.

Deadline for Materials

To provide adequate time to process your materials, deliver or e-mail them to TDS ten working days before the start date of assignment. Indicate any preferences you may have regarding the color of paper, stapled, collated, etc.

Materials Pick up

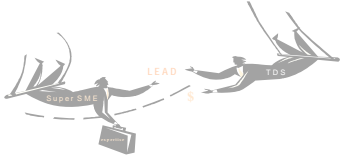
When your materials are ready, we will contact you for pick up.

Reimbursement of Cost for Duplication

You will not be reimbursed if you choose to make copies on your own.

Materials Upgrade (fee based)

If you would like to have your materials upgraded or digitized, please contact us.



THE MARKETING PARTNERSHIP PROGRAM

The Marketing Partnership Program was designed to enhance the professional relationship between Training and Development Solutions (TDS) and the Subject Matter Experts (SME) we rely on to deliver the solutions we sell to our mutual clients.

The program itself is simple: TDS will pay a fee to the SME when a referral they provide results in a contract for TDS. TDS will do everything we can to ensure the referring SME is the SME for contract, if that is the desire of the SME. However, the referral fee will be paid to referring SME irrespective of the SME delivering on contract.

Fee Structure

The referral fee is a minimum of \$50.00 **or** \$5.00 per billable hour of instruction or consulting (which ever is greater). For example, if a resulting contract has 40 hours of instruction or consulting, the resulting referral fee would be \$200.00.

The fee will be paid to the referring SME upon securing of contract.

When this would come into play?

Let's say you are meeting with a prospective client and you discover they have a need for a subject outside your area of expertise. Instead of cutting your losses and moving on, you refer them to us. If we secure a contract with them, you receive a return on the time you invested cultivating this lead. **You win twice: once by impressing the client with the resources you have available, and once by your referral fee!**

Procedures

1. Complete one MPP Referral Form for each contact.
(Please visit our website or contact our office for the form.)
2. Fax or submit via email as an attachment to info@tdsolutions.org.
3. TDS will date and time stamp the lead.
4. TDS will send an acknowledgement of receipt of referral.
5. TDS will send notification of results of referral to referring SME.

SME Guidelines Manual provided by Training and Development Solutions

Training and Development Solutions, a division of the Chabot-Las Positas Community College District reserves the right to revise this publication and make changes from time to time in its content without notice.

Printed September 2004

Revised 09/13/05, 03/06/06, 12/14/06, 2/1/07