

Clayton State University Continuing & Professional Education (CaPE)

on behalf of the
City of Forest Park

Presents

Clerical Skills Training Program

- **Microsoft Office Suite**
 - Word
 - Excel
 - PowerPoint

- **Memo and Letter Writing**
 - Writing Skills

- **Customer Service & Professional Etiquette**
 - Internal Customer Service
 - External Customer Service

Proposal (10.7.24)



Prepared by Dr. Tira Harney Clay, Ph.D.
CEO/President
Human Interaction Experience, LLC
Clayton State University-CaPE Consultant/Contractor

Clerical Skills Training Program

I. Program Narrative

Clayton State University Continuing Education and Training (CaPE) provides an onsite interactive and participatory curriculum for clerical staff on behalf of the City of Forest Park.

The *Clerical Skills Training Program* will be taught in three (3) Phases to include the following courses:

- **Microsoft Office Suite** teaches advanced Word, Excel, and PowerPoint skills to improve efficiency and productivity.
- **Memo and Letter Writing** focused on professional writing skills to ensure clear, professional communication.
- **Customer Service & Professional Etiquette:** Provide increased knowledge and skills to improve interactions with colleagues, leadership, and the public and promote a positive and professional work environment.

The Clerical Skills Training Program helps participants improve the accuracy, efficiency, and effectiveness of administrative tasks. The curriculum reinforces specific clerical job-related functions and allows participants to develop professional and technical skills for success. Participants are provided with skills to perform successfully in their current roles and beyond. They will be equipped with practical tools to improve their daily work, contribute to their overall career development, and receive a certificate of completion at the end of this program.

The Clerical Skills Training Program extends for 18 Hours/6 weeks (6 hours - Microsoft Office Suite; 6 hours - Memo and Letter Writing; 6 hours - Customer Service & Professional Etiquette training) commencing October 22, 2024, and ending December 3, 2024. The residential training will occur every Tuesday from 9 am - 12 pm at 745 Forest Parkway, Forest Park, GA 30297 (Council Chambers). The training will provide classes to include up to 25 clerical staff employees.

The Clerical Skills Training Program will offer three-hour Tuesday classes comprising multimedia and interactive workshops. The courses include pre- and post-assessments, theory, interactive exercises, hands-on training, and resources needed for enhanced competency and professionalism. Participants will acquire knowledge, skills, and competencies through training workshops facilitated by Clayton State University (CaPE) subject matter experts, administrative educators, and leaders.

Participants will also receive information referencing organizational skills, technical proficiency, communication skills, interpersonal effectiveness, time management, customer feedback and excellence, attitudes, behavior, communication skills, and problem-solving capabilities.

CLERICAL STAFF TRAINING PROGRAM

II. Program Overview

CAPE's education and training instructor will use appropriate teaching and learning approaches to engage diverse learning styles to:

Communication and Organizational Skills

- Formatting Business Documents, Letters, and Memorandums
- Introduction to the Clerical Profession
- Presenting with Confidence using PowerPoint Essentials
- Writing Essentials & Proofreading

Office Technology and Computations

- Applying Business Math in Excel
- Microsoft Excel Essentials
- Microsoft Outlook Essentials
- Microsoft PowerPoint Essentials
- Microsoft Word Essentials
- Office Equipment and PC Essentials
- Organization in the Office

Professional and Interpersonal Management

- Combining The Skills
- Courtesy, Respect, and Professionalism
- Customer Service
- Communication Skills, Diplomacy, and Managing Emotions

A. Scope of Services

The Clerical Staff Training Program is comprised of three (3) Phases. Participants will participate in 18 hours of curriculum-based course material, including Microsoft Office Suite, Memo and Letter Writing, and Customer Service & Professional Etiquette. Phase 1 (6 hours), Phase 2 (6 hours), and Phase 3 (6 hours) of education and training.

MICROSOFT OFFICE SUITE

Course Description

Microsoft Office Suite courses teach students how to use the Microsoft Office applications for a variety of tasks, including creating documents, spreadsheets, and presentations:

This six-week introduction course focuses on the essential features of Microsoft Office Suite, including Word, Excel, and PowerPoint. Participants learn how to create professional documents and presentations, analyze data, and create reports in Excel. This training teaches the basic knowledge needed to use the Microsoft Office suite and its main applications: Microsoft Word, Microsoft Excel, and Microsoft PowerPoint.

During this course, participants will be accomplishing the following:

MS WORD

Module 1: Text Basics

- Typing the text, Alignment of text
- Editing Text: Cut, Copy, Paste, Select All, Clear
- Find & Replace

Module 2: Text Formatting and saving file

- New, Open, Close, Save, Save As
- Formatting Text: Font Size, Font Style
- Font Color: Use Bold, Italic, and Underline
- Change the Text Case
- Line spacing, Paragraph spacing
- Shading text and paragraph
- Working with Tabs and Indents

Module 3: Working with Objects

- Shapes, Clipart and Picture, Word Art, Smart Art
- Columns and Orderings - To Add Columns to a Document
- Change the Order of Objects
- Page Number, Date & Time
- Inserting Text boxes
- Inserting Word art
- Inserting symbols
- Inserting Chart

Module 4: Header & Footers

- Inserting custom Header and Footer
- Inserting objects in the header and footer
- Add a section break to a document

Module 5: Working with bullets and numbered lists

- Multilevel numbering and Bulleting
- Creating List
- Customizing List style
- Page bordering
- Page background

Module 6: Tables

- Working with Tables, Table Formatting
- Table Styles
- Alignment option
- Merge and split option

Module 7: Styles and Content

- Using Build- in Styles, Modifying Styles
- Creating Styles, Creating a list style
- Table of contents and references
- Adding internal references
- Adding a Footnote
- Adding Endnote Module

8: Merging Documents

- Typing new address list
- Importing address list from Excel file
- Write and insert field
- Merging with Outlook contact
- Preview Result
- Merging to envelopes
- Merging to label
- Setting rules for merges
- Finish & Merge options

Module 9: Sharing and Maintaining Documents

- Changing Word Options
- Changing the Proofing Tools
- Managing Templates
- Restricting Document Access
- Using Protected View

- Working with Templates
- Managing Templates
- Understanding building blocks
- Module 10: Proofing the document
- Check Spelling As You Type.
- Mark Grammar Errors As You Type.
- Setting AutoCorrect Options

Module 11: Printing

- Page Setup, Setting margins
- Print Preview, Print
- MS EXCEL

Module 12: Introduction to Excel

- Introduction to Excel interface
- Understanding rows and columns, Naming Cells
- Working with Excel workbook and sheets

Module 13: Formatting Excel workbook:

- New, Open, Close, Save, Save As
- Formatting Text: Font Size, Font Style
- Font Color: Use the Bold, Italic, and Underline
- Wrap text, Merge and Centre
- Currency, Accounting, and other formats
- Modifying Columns, Rows & Cells

Module 14: Performing Calculations with

- Functions
- Creating Simple Formulas
- Setting up your formula
- Date and Time Functions, Financial Functions
- Logical Functions, Lookup and Reference
- Functions Mathematical Functions
- Statistical Functions, Text Functions.
- Module 15: Sort and Filter Data with Excel
- Sort and filtering data
- Using number filter, Text filter
- Custom filtering
- Removing filters from columns
- Conditional formatting

MEMO AND LETTER-WRITING SKILLS

Course Description

This course will utilize business writing rules, protocols, etiquette, and norms to improve writing skills for Email, text messages, memos, and business letters. When written effectively, each tool provides clear business communication and is valuable for enhanced customer connection and excellent service. In adherence to the City of Forest Park's rules for writing emails, memos, and letters, the business writing skills acquired from this course will reflect the City's standard. (*Participants will be provided with a detailed course syllabus*).

By the end of this course, participants should be able to:

1. Identify characteristics of effective professional emails.
2. Discuss the purpose and format of a memo.
3. Understand effective strategies for business memos.
4. Describe the distinct parts of a standard business letter.
5. Discuss emerging standards (netiquette) in social media for professional purposes.

Recommended Readings and Textbook:

- *Business Communication For Everyone* (c) 2019 by Arley Cruthers and is licensed under a [Creative Commons-Attribution-NonCommercial-Share Alike 4.0 International license](#)
- *Communication at Work* by Jordan Smith is licensed under a [Creative Commons Attribution 4.0 International License](#).
- Strunk, W., Jr., & White, E. B. (1979). *The elements of style* (3rd ed.). New York, NY: Macmillian.
- Wyrick, J. (2008). *Steps to writing well* (10th ed.). Boston, MA: Thomson Wadsworth.

CUSTOMER SERVICE AND PROFESSIONAL ETIQUETTE

Course Description

Customer service is the foundation of any business. It is a critical factor in the success of your city, department, and individual services as they are offered and perceived by your customers. The level of service we provide to customers makes us different from our competitors. The training segment is designed to help you learn about the level of service expected by the City of Forest Park. The knowledge, skills, and tools acquired throughout this course will help improve the service level you provide to internal customers (co-workers) and external customers (public).

The course teaches participants the skills to provide exceptional customer service to internal and external customers. It begins by identifying the characteristics of extraordinary customer service through excellent communication skills. Awareness and appreciation for diversity and inclusion are vital in the community and workplace. *Customer Service and Professional Etiquette* also provide tools and tactics to enhance listening skills, especially when working with demanding customers.

Teamwork is critical to providing excellent customer service to internal and external customers. Understanding the importance of the customer service cycle and the interfacing roles others play adds to the team's effectiveness. Professionalism, attitude, and stress management are critical skills that prepare clerical staff with the requisite tools to support their professional growth and development.

Upon completion of the course, participants should be able to:

Utilize Communication Skills:

- Identify the characteristics of excellent customer service
- Identify internal and external customers and the importance of good relationship-building
- Describe the main characteristics of effective communication
- Understand the communication process and problems or perceived barriers that can contribute to miscommunications and misinterpretation
- Identify your communication style

Appreciate Diversity & Inclusion:

- Understand the meaning of the terms diversity, inclusion, globalization, multiculturalism, and prejudice
- Describe the four stages of understanding/learning
- Identify the four fundamental principles of diversity
- Apply the ten tips for a respectful workplace

Develop Effective Listening Skills:

- Apply good listening skills and recognize the importance they play in communication
- Utilize and implement diverse levels of listening
- Identify and practice personal level of listening skills

- "Demonstrate an understanding of the barriers to effective listening and apply them at work" ("Customer Service Training Program - American Water Works Association")

Recognize Customer Service in Action:

- Utilize the knowledge of channels of communication for better customer interactions
- "Employ good telephone etiquette when assisting customers on the phone" ("Customer Service Training Program - American Water Works Association")
- Analyze role-playing and the elements of practical communication skills
- Understand personal operating style

Know How to Work with Difficult Customers:

- Apply good listening skills and recognize the importance they play in communication
- Utilize and implement various levels of listening
- Identify and practice personal level of listening skills
- Demonstrate an understanding of the barriers to effective listening and apply them at work

Value Teamwork:

- Understand the characteristics of a great customer service representative and apply them to everyday tasks
- Recognize the importance of working together as a team to improve customer service
- Identify and apply the traits of a good team member for effective performance

Adopt A Professional Attitude:

- I. Define professionalism and describe the benefits for customer service representatives
- II. Utilize the seven keys that promote an optimistic mental attitude
- III. Demonstrate and apply the power of a smile
- IV. Practice the steps to staying energized and positive

Identify Various Personality Types:

- Recognize the importance and benefits of knowing your personality type
- Understand different personality test types and models
- Compare the traits of personality style with that of other types to improve interpersonal relationships

III. CURRICULUM/COURSE SCHEDULE & OUTLINE

SESSION/DATE	CLASS	WEEK
Session 1 – October 22, 2024 <ul style="list-style-type: none"> • 9 am –10 am • 10 am –11 am • 11 pm – 12 pm 	Microsoft Office Suite (Word, Excel, PowerPoint) Memo and Letter Writing Customer Service & Professional Etiquette	1
Session 2 – October 29, 2024 <ul style="list-style-type: none"> • 9 am –10 am • 10 am –1 pm • 1 pm – 3 pm 	Microsoft Office Suite (Word, Excel, PowerPoint) Memo and Letter Writing Customer Service & Professional Etiquette	2
Session 3 –November 5, 2024 <ul style="list-style-type: none"> • 9 am –10 am • 10 am –1 pm • 1 pm – 3 pm 	Microsoft Office Suite (Word, Excel, PowerPoint) Memo and Letter Writing Customer Service & Professional Etiquette	3
Session 4 – November 12, 2024 <ul style="list-style-type: none"> • 9 am –10 am • 10 am –1 pm • 1 pm – 3 pm 	Microsoft Office Suite (Word, Excel, PowerPoint) Memo and Letter Writing Customer Service & Professional Etiquette	4
Session 5 – November 19, 2024 <ul style="list-style-type: none"> • 9 am –10 am • 10 am –1 pm • 1 pm – 3 pm 	Microsoft Office Suite (Word, Excel, PowerPoint) Memo and Letter Writing Customer Service & Professional Etiquette	5
Session 6 – December 3, 2024 <ul style="list-style-type: none"> • 9 am –10 am • 10 am –1 pm • 1 pm – 3 pm 	Microsoft Office Suite (Word, Excel, PowerPoint) Memo and Letter Writing Customer Service & Professional Etiquette	6

CLASS	HOURS
COMPLETE SESSIONS	
18 HOURS	
Microsoft Office Suite (Word, Excel, PowerPoint)	6
Memo and Letter Writing	6
Customer Service & Professional Etiquette	6
TOTAL COURSE COMPLETION	18 HOURS
CE CERTIFICATE	1.8 CEUs

IV. BUDGET & COMPENSATION

Clayton State University Continuing and Professional Education and The City of Forest Park's Clerical Skills Training Program provides 18 hours of training. Each segment comprises an overview in the following areas: Microsoft Office Suite (6 hours), Memo & Letter Writing (6 hours), and Customer Service and Professional Etiquette (6 hours).

- A. **Course/Curriculum Development/Design:** (includes course learning resources (i.e., digital and workbook), additional materials needed for the sessions, and Clayton State University Continuing & Professional Education – 1.8 CE hour Certificate.

AND

- B. **Course Delivery and Training**

- Hours: **18 hours**
- *Total Costs/Fee: **\$7,500**

** Cost/Fee is based on a class size of up to 25 students per cohort.*

- C. **Instructor Credentials**

Dr. Tira Clay is a strategic and purpose-driven leader and administrator. She is also a training and curriculum development/instructional design expert. Dr. Tira is an experienced and innovative leader in human resources, customer service, strategic transformations, turnarounds, building new businesses, and leading cultural change. Dr. Tira has years of experience as a leader, working with and guiding all levels of employees, including clerical staff.

Cynthis Reese is experienced in teaching Microsoft Office Suite and other relevant technology. She has a high degree of knowledge, skill, and experience working directly with adult learners. She is a business leader linked to emergent and in-demand industry and computer technology skills. Mrs. Reese is a computer technology expert and business professional who views learners as collaborative thinkers and vital resources for creating a dynamic learning environment. Mrs. Reese will provide the City of Forest Park's clerical staff with industry-based knowledge and skills to develop in-demand work-based learning experiences.

V. PAYMENT SCHEDULE

Two (2) Payments should be made by the following dates:

- *Training Begins* – Payment Due by October 22, 2024 - \$3,750
- *Training Ends* – Payment Due by December 3, 2024 - \$3,750



VI. PROPOSAL SIGNATURES

This contract will begin on October 22, 2024, and the option to renew will be available at the end of the agreement.

Clayton State University	City of Forest Park
Continuing & Professional Education (CaPE)	City of Forest Park
2000 Clayton State Blvd	785 Forest Parkway
Morrow, Georgia 30260 678-466-5115 reginaldturner@clayton.edu	Forest Park, GA 30297 Tel: 770 305 8118 Mobile: (404) 925-5964 sbrown@ forestparkga.gov
Signature:	Signature:
Name: Dr. Reginald Turner, Ph.D.	Name: Shalonda Brown, IPMA-SCP
Title: Executive Director	Title: Human Resources Director
Date:	Date: