Federal Buildings Personnel Training Act
Program Status & Priorities

Office of Federal High Performance Green Buildings
Kevin Kampschroer, Director
Brian Gilligan, FBPTA Program Manager
Agenda For Today

• Program Update (9 - 9:50)
• Agency Implementation (10 - 10:50)
• Proposals for Training Resources (11 - 11:30)
• Application to Contractors (11:30 - 11:50)
Implementation Expectations

June 2013

• Assess all GSA’s GS-1176 employees, post results
• Annual update to Competency Model, Curriculum
• Provide data to agencies using GSA’s Web Tool

September 2013

• Award contract to review training resources
• Develop initial cost and strategy for 1176 compliance
FBPTA Opportunities

- Reduce cost of operations at Federal facilities
  - PNNL: Reduce energy, break-downs; $0.5 - $2B Savings
  - IFMA: $4 savings / $1 investment in FM training

- Demonstrate effects of training on operations
  - We need to consider how to capture building data
  - Gather end user comment, share agency strategies

- Improve the quality of training

- Raise the status of the profession
What is FBPTA’s Scope?

Federal Buildings Personnel – FMI
~40,000 Civil Servants; + Contractors
(Program – 1 FTE, $300K Annual Budget)

Federal Acquisition Personnel – FAI
~75,000 Civil Servants
(Program – 12 FTE, $10M+ Annual Budget)
FBPTA Challenges

• Limited resources for Program development
• Shrinking budgets at agencies for training
• Competing priorities for time
• Lack of enforcement clause
FBPTA Activities

• Targeted outreach to stakeholders
  – Presentations at various events
  – Discussions with individual agencies
  – Test Cases: GSA, VHA, DOD

• Update to GSA’s standards for GS-1176 position

• Develop method to review training resources
  – Similar to approach used by Federal Acquisition Institute

• Address program capacity
Feedback on Competencies

• There are opportunities to focus the model
  – Broad approach means significant effort by agencies to apply
  – No early-career definition or career progression
  – Does not prioritize high-value competencies
  – Model may be more complicated than necessary
Align Competencies to Functions

• Consider three functions:
  – Facility / building managers
  – Bld / equipment operators
  – Energy managers

• Align competencies
  – Consider “awareness”

• Remain agnostic to series
  – Give broad guidance
  – Maintain required flexibility
Propose Career Progression

- **Facility Manager Function**
  - Aligned competencies only
- **Professional certifications**
  - Typically “Master” level
- **Professional certificates**
  - Entry level / early career impact
  - Add Federal references

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<tr>
<th>Facility O&amp;M Management</th>
<th>IFMA FMP</th>
<th>BOMI PAC</th>
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Look for Most Value-Added

- Prioritize competencies
  - What is routine, or well-covered?
  - What are game-changers?

- Role of “awareness”
  - Understanding design intent, equipment capabilities

- Government references
  - Federal best-practices
  - Important local information
Streamline Where Practical

- Some redundancies
- Level of detail varies
  - General vs. highly detailed
  - Wide span vs. narrow focus
  - Routine vs. forward leaning

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Competency Model Next Steps

By Apr 19

• Request specific FBPTA point of contact (POC) for Federal agencies
• Post a survey for gathering competency input on FMI.gov

By May 03

• Agencies submit survey, other comments to AskFMI@gsa.gov

By May 17

• GSA will post draft competency model, curriculum on FMI.gov

By June 14

• GSA will post the model and curriculum update on FMI.gov
Feedback on Human Capital

National approach to human capital and labor relations

- Concerns about coordination with labor relations groups
- Authority to gather information
- Purpose of information gathered?
- Implementation requires significant human capital planning
Human Capital Planning at GSA

GSA holds standard for 1176 Series; FBPTA requires update

• Management - Union Pre-Decisional Involvement (PDI):
  – Invited to participate in working groups, notified of skills assessment

• OPM facilitate review of standards with GSA subject matter experts
  – Process and draft PD/Performance Plans will be posted to www.fmi.gov

• Evaluate statutory and contractual labor relations impacts of:
  – Revised Position Description and Performance Plan documents
  – Strategy to fill gaps identified in national skills assessment

• National Consultation Rights may require advisory notice be given to unions at the national level. (AFGE, NFFE, PASS, NTEU, NEA)
National Human Capital Approach

National Chief Human Capital Officer Council - May

• Assessing qualifications to address the Act
  – GSA assessment and PDI approach can be a guideline for agencies
  – Agencies must meet their contractual and statutory labor relations obligations directly with their own unions
  – Convey GSA’s policy and use for information gathered

• Define a process to review existing competency models

• Confirm approach to human capital planning
  – Discuss GSA/OPM approach to GS-1176 documents
  – How to align competencies with other national standards
Feedback on Program Tools

• Users highlight required upgrades to web tool
  – Automate process to assign competencies
  – Customize to agency organizational structures
  – Reflect agency roles, terminology, added competencies
  – Improve program and individual reporting

• Identify and evaluate proposed training
  – Add qualifications, especially early-career, to web tool
  – Emphasis on low, no-cost vehicles for “awareness”
## Guide Supervisor/Employee Discussion

<table>
<thead>
<tr>
<th>Status</th>
<th>Building Systems Competencies</th>
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<tbody>
<tr>
<td>Complete (1)</td>
<td>1. Demonstrate familiarity with Building Systems: HVAC, Electrical (and Standby generators), Lighting, Mechanical/Plumbing (and Fire protection systems), Vertical transportation, Structural, Roofing, Building Envelope.</td>
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<td>Complete (1)</td>
<td>2. Demonstrate ability to work with Facilities Team to assess a facility’s need for building systems.</td>
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<td>Complete (1)</td>
<td>3. Demonstrate ability to oversee the acquisition, installation, and operation of building systems.</td>
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<td>Complete (1)</td>
<td>4. Demonstrate ability to work with Facilities Team to establish practices and procedures.</td>
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<td>Required</td>
<td>5. Demonstrate ability to work with Facilities Team to determine and administer the allocation of building systems’ resources.</td>
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<td>Complete (2)</td>
<td>6. Demonstrate ability to monitor and evaluate how well building systems perform.</td>
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<td>Complete (1)</td>
<td>7. Demonstrate ability to manage corrective, preventive and predictive maintenance.</td>
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<td>Not Required</td>
<td>8. Demonstrate ability to work with Facilities Team to develop emergency procedures for building systems.</td>
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<td>Not Required</td>
<td>9. Demonstrate knowledge of how to implement disaster recovery plans for building systems as required.</td>
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<th>Status</th>
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<td>Complete (1)</td>
<td>1. Demonstrate knowledge of how to evaluate building structures and permanent interiors.</td>
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<td>Complete (3)</td>
<td>2. Demonstrate ability to manage the service/repair requests, maintenance, cleaning needs of building structures, and permanent interior elements.</td>
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<td>Complete (3)</td>
<td>3. Demonstrate ability to evaluate furniture and equipment performance.</td>
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<tr>
<td>Complete (3)</td>
<td>4. Demonstrate ability to manage the maintenance and cleaning of furniture and equipment.</td>
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Guidance Will Automate Entry

- GSA developed a career progression for GS-1176 series
- Web Tool will allow GSA 1176 employees to start from here
- Supervisor retains ability to adjust individual performances

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<th>Building Systems</th>
<th>N/A, COR</th>
<th>3rd Party</th>
<th>GS9/11</th>
<th>GS12/13</th>
<th>GS14/15</th>
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Program Tool Improvements

- Web tool contract now through OPM eLearning
- Near-term web tool improvements
  - Improved program reporting
  - Agency-specific competency assignment
  - Customized facility organization drop-downs
  - Organizational coverage visualization
- OPM can work directly with agency stakeholders on PD and Performance Plan Development
Conclusion

• Our priorities for June 2013
  – Add focus to Competency model and curriculum
  – Address human capital and labor relations nationally
  – Upgrade Web Tool to lighten burden

• Our “Ask” of your agency
  – Identify a specific point of contact for FBPTA
  – Consider how to apply the Act from an assessment, HCAM and labor relations perspective
  – Let us know how we can help implement

• Questions / Concerns?
Session 2

AGENCY IMPLEMENTATION
GENERAL SERVICES ADMINISTRATION

JONATHAN FOYE
PROGRAM MANAGER
GSA PUBLIC BUILDINGS SERVICE, CENTRAL OFFICE
Agenda

• Assigning competencies to impacted population

• Initial Assessment Rollout - guidance provided to pilot community (discuss map, training) & lessons learned

• Full assessment goal and schedule

• Next Steps for Training
Impacted Population

• O&M staff in a Service Center or Field Office assigned to a specific building code
• Mostly GS-1176; but, other series might include: 809, 1601, 1101, Engineering Techs, those performing some lease work
• Of the 827 Building Managers:
  – 49 GS-14 Supervisors who must register to manage their employees
  – 177 GS-13 Supervisors responsible for their own competencies and those of their direct reports
  – 598 GS-12 and below employees responsible for their own competencies
## Assigning Competencies

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<th>Comp Area</th>
<th>Core Comp</th>
<th>Performance</th>
<th>Require OJT</th>
<th>COR = Oversite / Partner</th>
<th>Performed by others (who?) or Outsourced</th>
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<td>4a2 Demonstrate knowledge of Combined Heat and Power (CHP) Systems and distributed generation</td>
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<td>4a4 Demonstrate knowledge of Thermal Energy Storage systems – (ex. chilled water storage, ice storage, potential energy storage etc)</td>
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<td>4a5 Demonstrate knowledge of Building Automation Systems (BAS) and Control Systems.</td>
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<td>4a6 Demonstrate knowledge of Enhanced Automation (EA) – “the variety of potential strategies to increase the capability of the existing energy or building management systems to control current, and plan for future, building energy costs while maintaining the comfort and productivity of all building occupants.” <a href="http://www.energy.ca.gov/enhancedautomation/">http://www.energy.ca.gov/enhancedautomation/</a></td>
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<td>4a8 Demonstrate knowledge of re-programming current systems and expanding network of sensors and control devices to optimize HVAC, lighting and other automated systems.</td>
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<td>4a9 Demonstrate knowledge of how to incorporate occupancy sensors, task lighting, thermostat set-points with weather forecasting and other demand linked strategies to optimize building performance.</td>
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<td><strong>Assess Initial Conditions</strong></td>
<td>4b1 Demonstrate knowledge of how to perform and Energy Savings Assessment: Example <a href="http://www1.eere.energy.gov/femp/program/om_wgresources.html">http://www1.eere.energy.gov/femp/program/om_wgresources.html</a></td>
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<td>▪ Energy Audit – Types I, II, III</td>
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<td>▪ Utility Bill Analysis</td>
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<td>4b2 Demonstrate knowledge of laws, regulations and Executive Orders that pertain to energy management, status of compliance and existing energy management plans. See FEMP website of list of laws and regulations: <a href="http://www1.eere.energy.gov/femp/regulations/regulations.html">http://www1.eere.energy.gov/femp/regulations/regulations.html</a></td>
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<td>O&amp;M Vendor</td>
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Service Center Test Assessment

When: February – March 2013

Who Participated:

27 participants (4 Sups, 10 Supervisory Employees, 13 Employees)

Guidance Provided:

Training/Demo, Competency Application Map

Results/Feedback:

• Time consuming for managers (PBS Process)
• Need for reference materials after training
• Have participants begin process during training sessions
• Need to develop program-level reporting for implementation
• Limited reporting makes it difficult to track progress and completion
• Formalized training materials
## National Key Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Milestone</th>
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<tbody>
<tr>
<td>Mar. 15</td>
<td>Regional Leaders to identify local FBPTA Regional POCs</td>
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<tr>
<td>Apr. 1 – 28</td>
<td>FBPTA Regional POC Training Sessions – led by CO</td>
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<tr>
<td>Apr. 29 – May 18</td>
<td>Core Competency Web Tool Training for users – led by FBPTA Regional POCs</td>
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<tr>
<td>May 20 – June 14</td>
<td>Core Competency Web Tool Opens for staff to complete profiles</td>
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<tr>
<td>June 14</td>
<td>Staff work with Managers to address and close any identified development gaps</td>
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</table>
Implementing Training

Link Currently Used Training: BOMI, IFMA, Penn State
  o Identified commonly-used training across regions
  o Complete mapping to competency model
  o Adjust / prioritize training efforts

Required Federal References and Local Knowledge (Top-10)
  o Federal regulations and requirements for energy and water
  o Local knowledge and use of utility meters
  o Useful tools and resources (SF Tool, FEMP O&M Guide, etc)
VETERANS HEALTH ADMINISTRATION

OLEH KOWALSKYJ, MSCE, CHFM, CCS
DEPUTY DIRECTOR
VHA CAPITAL ASSET MGT, ENGINEERING AND SUPPORT
21 Veterans Integrated Service Networks

- 152 Medical Centers
- 990 Outpatient Clinics
  - 821 Community-Based
  - 152 Hospital-Based
  - 11 Mobile
  - 6 Independent
- 300 Vet Centers*
- 70 Mobile Vet Centers*
- 102 Domiciliary Residential Rehabilitation Programs
- 134 Community Living Centers

Source: FY 2012 End-of-Year Pocket Card
Veterans Health Administration

VHA Employees = 277,000 +
Engineering-Facilities = 10,000 ++

Chief Engineer-Facilities
Safety Specialist
Mechanical Engineer
Electrical Engineer
Architect
Pneumatic Systems Mechanic
Asst. Chief Engineer-Facilities
Interior Designer
Security Systems Installer
Radiation Safety Officer
Energy Engineer/Manager

Utility Systems Operator
Machinist
Project Engineer/Manager
Boiler Operator
Elevator Mechanic
Electrical Worker
A/C Mechanic
Electrician
Machinist
Energy Engineer/Manager

Maintenance* Supervisor
Steamfitter
Biomedical Engineer
Laborer

Operations* Supervisor
Building-Industrial Controls Mechanic
Plumber
Industrial Equipment Mechanic

Managers/Supervisors

Non-Supervisory

White Collar **

Trade-Craft-Labor Occupations

FEDERAL HIGH-PERFORMANCE GREEN BUILDINGS
• Federal Service Labor-Management Relations Statute
• Labor Management Agreements (National + Local)
• Executive Order 13522

Labor Management Considerations:
Management Rights
Employee Rights
Permissive Subjects
Conditions of Employment
Past Practices (+others)

“Supervisory Notes”-
“System” of Records; PII
Pre-Decisional involvement
Duty to Bargain
Impact & Implementation
FEDERAL HIGH-PERFORMANCE GREEN BUILDINGS

Pilot Project to assess:
- Ease of Use
- Functionality
- Application to complex healthcare system

Engage “exempt” employees only (non-bargaining)
Limit Occupations
Competencies for “fictitious” employees

Unsettled: Labor-Management concerns

TEST
VHA “Test”

- VA Maryland Healthcare System
  - 1 of 5 VA Medical Centers within the Service Network
  - 3 Medical Center Campuses
  - 6 Community Based Outpatient Clinics
  - 176+ FTEE in Engineering/Facilities (includes Safety and Biomedical Engineering)

- Project scalable to other locations (US + Territories)
Organizational Coverage

- 43 Core Competencies,
- 232 Performances,
- Requires more than one individual
VA Maryland HCS Coverage

- **Level of knowledge**
  - Awareness, Entry, Journey, Master
- **Local vs. Regional expert/support**
- **Manager vs. Operator**
  - Impact of “awareness”
  - Additional granularity at operational level
- **Value of Certifications**
  - Various, common at manager, expert, trade levels
- **Future steps (first “pass” complete)**
  - National HR approach
  - Expand to other positions
  - Expand competencies for healthcare specific
  - GuidanceSCALE to other VISNs
  - Develop/Implement Communication Plan
  - Develop Education/Training series (VHA specific)
  - National roll-out
  - Identify qualifying certifications/training
  - Identify competency/training gaps

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<tr>
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<th>Facility Engineer</th>
<th>Mechanical Section</th>
<th>Projects Section</th>
<th>Industrial Hygienist</th>
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<tr>
<td><strong>Facility O&amp;M</strong> Management</td>
<td>Building Systems</td>
<td>Building Interior</td>
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<td>Other Facility Systems</td>
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<td>Electrical / Mechanical Life Safety Systems</td>
<td>General Building</td>
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<td>Contracts</td>
<td>Occupants</td>
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<td><strong>Design</strong></td>
<td>Planning</td>
<td>Infrastructure</td>
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<td>Background Regulations and Requirements</td>
<td>Implementation</td>
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<td>Project Initiation</td>
<td>Closeout</td>
<td>Training</td>
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<td>Contracting</td>
<td>Budgeting</td>
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<td><strong>Leadership and Innovation</strong></td>
<td>Communication</td>
<td>Personal</td>
<td>Innovation</td>
<td>Enterprise Knowledge</td>
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**CFM (IFMA) Certification**
DEPARTMENT OF DEFENSE

GEORGE MINO, PE
SENIOR PROGRAM ANALYST / CIVIL ENGINEER
DIRECTORATE OF FACILITIES INVESTMENT & MANAGEMENT
DoD Workforce Legislation

- Defense Acquisition Workforce Improvement Act, 1990:
  - Education and training standards, requirements, and courses
  - Defense Acquisition University

  - DoD Strategic Workforce Planning
  - Identify critical skills, competencies, and training

- Federal Buildings Personnel Training Act, 2010

  - DoD Energy Manager Training
  - Improve knowledge, skills, abilities, and lessons learned
DoD FBPTA Chronology

- Fall 2011 - Kickoff meeting with GSA at Pentagon; evaluated union impacts
- Spring 2012 - Commented on draft core competencies and provided lists of DoD training
- Fall 2012 - Components express concerns with FBPTA webtool developed by GSA
- Feb 2013 - Webtool pilot tests by DoD Components
- Mar 2013 - Meeting with GSA & Federal Agencies on contractor compliance with FBPTA
Webtool Pilot Tests by DoD

- Redundant with DoD workforce management systems
- Need separate tools for blue and white collar (it can be argued many DoD white collar positions already meet intent of FBPTA)
- Competencies appear well defined but too broad
- Little benefit if not customized for DoD requirements
- Confusion on the population impacted by FBPTA such as applicability to design professionals (House Report said “design” only applies to energy management, and not building O&M)
- Relating competency to energy and water savings is impractical
- Training plans currently limited to industry certifications
- Significant burden on employees and supervisors in a severely constrained budget and staffing environment
DoD Implementation Plan

- Near term focus on Energy Managers (GS series):
  - Maximizes “return”
  - Complies with DoD Energy Manager Training legislation
  - Starting in summer 2013, integrate FBPTA webtool, and similar existing DoD systems, into the new Defense Competency Assessment Tool (DCAT) developed in response to DoD Strategic Workforce Planning legislation
  - Customize webtool requirements for DoD use, and work with GSA to review existing DoD training resources for inclusion as approved qualifications
- Due to resource constraints, using DCAT for other FBPTA impacted occupational series (e.g., wage grade building O&M) will be deferred until after 2016
OPEN FORUM AGENCY IMPLEMENTATION, ISSUES

BRIAN GILLIGAN, PE, LEED-AP
SUSTAINABILITY PROGRAM MANAGER
OFFICE OF FEDERAL HIGH PERFORMANCE GREEN BUILDINGS
Session 3

SUBMISSION AND EVALUATION OF TRAINING RESOURCES
Evaluating Training Resources

**Vendor Evaluation Criteria**
- Near-term: Process to confirm alignment
- Long-term goal: Formal conformity model

**Provider Program Requirements**
- JTA-based learning objectives
- Systematic program plan
- Learning outcomes assessed
- Adequate staff / facilities

**Competencies**
- FBPTA
- Agency-specific

**FBPTA Competency Model**
*Core Competencies and performances*
*Based on Job Task Analyses and community review*

**Accreditation**
*FBPTA or 3rd Party*

**FBPTA “Qualifications”**
*Certificate Programs / Certifications*
*Professional Registrations / Licenses*

**Accreditation**: Given to a program or institution by an objective evaluating body as meeting a set of standards.

**Individual Credential**: Given to an individual by an objective evaluating body as meeting a set of standards.
Why Do This?

• Identify current training priorities and emphasis
• Align with competency model where possible
• Load resources into Web Tool
### Submission Template

#### Qualification Resources
- **Course / Certificate Programs**
- **Certification / Registration / License**

#### Submission Requirements
- Specific learning objectives
- Skills / material covered
- Training Methods
- Competencies aligning completely
- Competencies aligning partially

Submission document and instructions will be posted on [www.fmi.gov](http://www.fmi.gov)
Near-Term Submission Process

- Agency identifies priority training resources
- Training provider completes and submits form and accompanying documentation
- GSA / 3rd Party “verification” of information
- Training provider comment
- Public comment
- Post verified qualification to CC Web Tool
Long-Term Submission Process

• Forthcoming DOE conformity model project
  – Quality and consistency of commercial workforce training and certification programs
  – Identifying criteria for third party accreditation
  – Working with GSA to include Federal core competencies

• GSA continues to maintain competency model
  – Ensure that training learning objectives align
Our “Ask” of Federal Agencies

• Identify top 1-2 training resources by May 17
  – Facility or energy management, building operations
  – Distinguish level (Entry, Journey or Master) served
  – Submit priorities to GSA using form on www.fmi.gov

• GSA will post prioritized list of resources
Session 4

CONTRACTOR CERTIFICATION OF COMPLIANCE
Working Group Discussion

• Flesh out requirements for civil servants first
• Larger, broader scope contracts first
• Develop a FAR clause(s) for consistency
• Balance needed between:
  – Quality of oversight and ability to track data
  – Burden on contractor and contracting communities
• 3rd Party Certification consistently stressed
  – GSA O&M contracts require choice between 3 industry certifications for HVAC technicians
Options Framed for Future

• Self-Certification
  – Least burden, quickly and consistently applied
  – Little oversight or control, no comparable data

• Performance – Training plan or 3rd Party Certs
  – Allows some control with room for innovation
  – Burden on contracts, may not give comparable data

• Prescriptive – Follow agency requirements
  – Significant control, most comparable data
  – Significant burden, too much for smaller contracts
Conclusion

• Our priorities for June 2013
  – Add focus to Competency model and curriculum
  – Address human capital and labor relations nationally
  – Upgrade Web Tool to lighten burden

• Our “Ask” of your agency
  – Identify a specific point of contact for FBPTA
  – Consider how to apply the Act from an assessment, HCAM and labor relations perspective
  – Identify priority training resources
  – Let us know how we can help implement