FORM FOR SCORING OF TRAINING RESOURCE TO FULFILL FEDERAL BUILDING PERSONNEL TRAINING ACT (FBPTA) CORE COMPETENCIES

The FBPTA requires Federal building personnel to demonstrate compliance with a set of Core Competencies. The General Services Administration (GSA) accepts submissions for courses, certificates, certifications, accreditations, registrations, licenses, and other qualifications that demonstrate alignment with the FBPTA Core Competencies. GSA will post resources that sufficiently map to FBPTA Core Competency requirements on the FMI webpage (www.fmi.gov) and may incorporate them into the Core Competency Web Tool. The Web Tool allows Federal buildings personnel to immediately claim credit for competencies met by completing approved training. FMI and the Core Competency Web Tool help Federal employees identify appropriate training, and allow Federal agencies to share information on training sources. To qualify for consideration, submitters complete this form describing how a specific training resource, certification / accreditation, license or other resource aligns with FBPTA core competencies through AskFMI@gsa.gov.

Initial Review Conducted By: Maria Fara

Initial Review Submission Completion Date:

Technical Review Conducted By: Kathy Powers

Technical Review Submission Completion Date: 1/17/14

Alignment of Competency with Functional Roles

	Often Aligned with Facility Management roles (24/43 Core Competencies)
	Often Aligned with Building Operations Professional roles (6/43 Core Competencies)
	Often Aligned with Energy Management Role (7/43 Core Competencies)
	Often Aligned with more than one role (6/43 Core Competencies)

1. Please complete the following for each training course submitted for consideration:

Training provider: BOMI International

Provider address information (primary physical location, including address, city, state, zip code): One Park Place Suite 475, Annapolis, MD 21401

Provider's primary point of contact for this learning resource (name, primary physical location (if different from provider address information), phone, and email): Ron Bishop, (410) 974-1410 x1259, rbishop@bomi.org

Title of this training resource: Managing The Organization

Type of training course: Property and Facilities Management

Does this course provide CEUs (Continuing Education Units) and if so, how many and for what occupation or field? Yes, 30 USGBC CE Hours towards LEED Credential Maintenance Program.

Learning objective(s) associated with this training course: Enhance management and leadership skill development with an emphasis on managing relationships, problem solving strategies, decision-making approaches and tools, effective communication, performance development, strategic, operational and tactical planning to meet organizational goals and objectives.

Delivery method and learning methods (delivery methods may include online instruction, classroom instruction, or other means, and learning methods could include lecture, group work, essay work, quizzes, or other learning activities): Instructor Led Online, Self-Study, Live Classroom/Accelerated Review. Learning Methods, lecture, group work, quizzes, practice exam, 3rd Party proctored final exam.

Length of training (in hours): 30 Hours

URL link to information about the training course, content, and/or syllabus: http://www.bomi.org/Courses/Managing-the-Organization/

2. Review the course objective(s) that have been submitted as being aligned with required FBPTA performance criteria. Review the learning methods in the course that will support that learning objective(s).

FBPTA Core Competency Area	FBPTA Core Competency	Required FBPTA performance criteria	Based on technical review of learning objectives and skills, does this resource map to the performance criteria?	Initial Review: Are all submission requirements included?	Initial Review: Are descriptions clear and logical?	Initial Review: Are all materials referenced included with the submission?	Technical Review: Learning Objectives Reviewed	Technical Review: Skills Reviewed	Technical Review: Are there any clarifications requested?	If clarification requested, note here	Clarification Response From Provider	Technical Review: Identify other materials submitted	Technical Review: Other Materials Reviewed
1.Management of Facilities O&M	1.1 Management of Building Systems	1.1.2.Demonstrate ability to work with Facilities Team to assess a facility's need for building systems.	Partial. Based on the clarification response from provider, it appears that the course covers a general knowledge of working with Facilities Team to assess a facility's need for building systems. Specific systems are addressed in the individual system courses.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course covers working as a team but does not appear to demonstrate ability to assess a facility's need for building systems.	This course addresses problem solving, planning, controlling an decision making and effective team/group leadership at a global level versus individual system level. Assessing a facility's needs for building systems is integrated into BOMI courses for specific systems to include: Air Handling, Water Treatment & Plumbing Systems; Boilers, Heating Systems and Applied Mathematics; Refrigeration Systems and Accessories; Electrical Systems and Illumination; Energy Management and Controls and the Facilities Planning/Project Management and Fundamentals of Facility Management courses	Course description from provided link.	No
		1.1.4.Demonstrate ability to work with Facilities Team to establish practices and procedures.	Partial. Based on the clarification response from provider, it appears that the course demonstrates ability to work with Facilities Team to establish practices and procedures at a high level only. The course does not cover the procedures at the building systems level. This is covered in each of the individual system courses.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course covers management responsibilities but does not appear to demonstrate ability to establish practices and procedures for facilities operations and management.	This course addresses problem solving, planning, controlling an decision making and managing change at a global level versus individual system level. Working with a facility team to establish policy and procedures is integrated into BOMI courses for specific systems to include: Air Handling, Water Treatment & Plumbing Systems; Boilers, Heating Systems and Applied Mathematics; Refrigeration Systems and Accessories; Electrical Systems and Illumination; Energy Management and Controls as well as FM specific courses: Facilities Planning and Project Management and Fundamentals of Facility Management courses	Course description from provided link.	No

3. Technology	3.1. Technology Solutions	3.1.1.Demonstrate ability to monitor information and trends related to facility management technologies.	No, it does not appear that the course demonstrates knowledge of facility management technologies.	Yes	Yes	Yes	Yes	Yes	No		A case study is centered on a property pursuing LEED certification. Included are aspects of selecting and installing a new energy management system and other systems related to the technologies within the property.	Course description from provided link.	No
		3.1.3.Demonstrate ability to identify evaluation criteria, evaluate, and recommend facility management technologies solutions.	No, it does not appear that the course demonstrates knowledge of facility management technologies.	Yes	Yes	Yes	Yes	Yes	No		A case study is centered on a property pursuing LEED certification. Included are aspects of selecting and installing a new energy management system and other systems related to the technologies within the property.	Course description from provided link.	No
		3.1.4.Demonstrate ability to assess how changes to facility management technologies will impact current infrastructure, processes, and building systems.	No, it does not appear that the course demonstrates knowledge of facility management technologies.	Yes	Yes	Yes	Yes	Yes	No		A case study is centered on a property pursuing LEED certification. Included are aspects of selecting and installing a new energy management system and other systems related to the technologies within the property.	Course description from provided link.	No
		3.1.6.Demonstrate ability to recommend and communicate policies. Establish practices and procedures.	Partial. This course received credit because the course provides general knowledge of communicating policies and establishing practices and procedures. However, the course does not cover this in relation to the competency area of Technology Solutions.	Yes	Yes	Yes	Yes	Yes	No		A case study is centered on a property pursuing LEED certification. Included are aspects of selecting and installing a new energy management system and other systems related to the technologies within the property.	Course description from provided link.	No
		3.1.7.Demonstrate ability to develop and implement training programs for facilities staff and ancillary resources.	No, it does not appear that the course demonstrates ability to develop and implement training programs for facilities staff and ancillary resources with respect to FM technology.	Yes	Yes	Yes	Yes	Yes	No		A case study is centered on a property pursuing LEED certification. Included are aspects of selecting and installing a new energy management system and other systems related to the technologies within the property.	Course description from provided link.	No
3. Technology	3.2. Building Automation Systems (BAS)	3.2.3.Demonstrate ability to conduct trouble-shooting procedures at the equipment, system, and building levels.	No, it does not appear that the course demonstrates ability to conduct troubleshooting procedures at the equipment, system, and building levels with respect to utilizing the BAS.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		3.2.4.Demonstrate ability to conduct trouble-shooting of critical systems.	No, it does not appear that the course demonstrates ability to conduct troubleshooting of critical building systems with respect to utilizing the BAS.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
4. Energy Management	4.5. Planning, Project and Program Management	4.5.1.Demonstrate knowledge and ability to develop an Energy master plan.	No, it does not appear that the course demonstrates knowledge and ability to develop an Energy Master Plan. The core competency here is Energy Management, not planning, and the topic of energy management does not appear to be covered in this course.	Yes	Yes	Yes	Yes	Yes	No		The course does offer a complete chapter on planning, controlling and decision making (CH7). While it does not specifically focus on developing an Energy Master Plan it would ensure that managerial skillsets necessary to complete the plan are in place. For example, LO 7.2 = Identify and describe the steps in the planning cycle and benefits associated with effective planning. This focuses on several steps: Analysis of current position, defining the goal, exploring/evaluating alternatives, selecting best alternative, Go/No go decisions, Implementing the plan, solidifying the plan, post-plan evaluation and then the cycle beginning again	Course description from provided link.	No
		4.5.15.Demonstrate the ability to recommend and/or acquire certifications for specific skills.	Partial. It does appear that the course demonstrates the ability to recommend and/or acquire certifications for specific skills but does not address the core competency of energy management.	Yes	Yes	Yes	Yes	Yes	No		This course does offer management strategies for aligning organizational objectives and employee performance. LO 2.10 = Describe how to measure performance in both organization and employees - identifying methods for enhancing skillsets is part of the performance discussion in terms of behavioral changes to affect organizational outcomes in any area of work performance.	Course description from provided link.	No

Category	Subcategory	Competency	Assessment							Comments	Notes	Source	
7. Sustainability	7.3. Implementation	7.3.4.Demonstrate knowledge of implementing a "recognition program" for sustainability efforts.	Yes, based on review of learning objectives, skills/material covered, this course covers a "recognition" program that could be applied to sustainability.	Yes	Yes	Yes	Yes	Yes	No		The course does not specifically discuss implementing a "sustainability effort" recognition program but it does discuss Motivating employees and using recognition as a tool. LO 6.8 = describe ways to motivate employees using compensation, recognition and rewards. This is a general management skill discussion that could be applied to recognition for Sustainable programs, workplace safety etc...Specific examples are discussed in terms of how to address these types of items through goal setting and program examples	Course description from provided link.	No
9. Project Management	9.1. Initiate	9.1.1.Demonstrate ability to work in integrated project teams to execute, small, medium, and large projects. http://www.wbdg.org/project/deliveryteams.php	No, it does not appear that the course demonstrates ability to work in integrated project teams (e.g., Facility Managers, Building Operating Engineers, Planners, Contracting Officers, Contractors, Occupants) to execute, small, medium, and large projects.	Yes	Yes	Yes	Yes	Yes	No		This topic is covered in the BOMI Facilities Planning and Project Management course	Course description from provided link.	No
11. Communication and Administration	11.1. Communication and Administration	11.1.1. Demonstrate ability to communicate clearly.	Yes, based on the clarification response from provider, it appears that the course demonstrates ability to communicate clearly.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course covers communication skills and how to conduct meetings but does not appear to demonstrate ability to: o Comprehend written and graphic information o Comprehend financial and technical information o Negotiate for services, resources, information and commitments o Establish personal and professional networks	Graphic information: L.O. 7.9--Describe and discuss the distinctions among the various types of organizational plans, planning processes and tools, such as SWOT analysis, Gantt, and PERT scheduling; LO 5.5 = Identify and describe the roles of an informal network and how they can serve to assist managers addresses the value of establishing personal/professional networks; LO 9.3 = Describe what managerial skills are necessary when managing self/individual team and system changes. Discussion on negotiation strategies of win/win and other communication strategies for achieving success; the requirement for managers to understand financial and technical information would be identified/reviewed in this course but practice of this would be in specific BOMI courses related to these topics: REIF; Budgeting & Accounting; specific system courses	Course description from provided link.	No
		11.1.2. Demonstrate ability to supervise personnel as required.	Partial. It appears the course will demonstrate ability to supervise personnel in all the areas listed except for "coordinate work performed as contracted services".	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate ability to supervise personnel in all the areas listed except for "coordinate work performed as contracted services".	Supervision in this course does not distinguish between internal personnel and "contracted services" specifically.	Course description from provided link.	No
		11.1.3. Demonstrate ability to perform administrative duties.	Yes, based on the clarification response from provider, it appears that the course demonstrates ability to perform administrative duties.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate ability to make decisions and solve problems but does not cover the performance criteria of demonstrating ability to perform administrative duties: o Administer policies, procedures and practices o Administer the acquisition, distribution and use of material resources o Maintain documentation systems	LO 1.3 = List at least 3 skills a manager must display - focus on documenting and researching -documenting in the form of appropriate plans, performance and goals; LO 9.8 = Explain the importance of manager control, control systems, and classifications of these systems and ways to seek balance in the control process - administration is addressed in terms of control in this course with a focus on performance, standards and metrics to be effective	Course description from provided link.	No
	11.2. Personnel	11.2.1. Demonstrate knowledge and ability to ensure corporate, life safety, and regulatory compliance.	Partial. It appears the course will demonstrate ability to evaluate and manage organizational goals/objectives but does not cover the performance criteria of demonstrating knowledge ability to: o Monitor changes in laws and regulations. o Assure the facility and its operation complies with laws and regulations o Monitor and assure changes in the facility function and services o Monitor information and trends about human and environmental concerns o Ensure training is conducted to maintain safe and effective use of the facility o Conduct due diligence studies	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate ability to evaluate and manage organizational goals/objectives but does not cover the performance criteria of demonstrating knowledge ability to: o Monitor changes in laws and regulations. o Assure the facility and its operation complies with laws and regulations o Monitor and assure changes in the facility function and services o Monitor information and trends about human and environmental concerns o Ensure training is conducted to maintain safe and effective use of the facility o Conduct due diligence studies	This is a correct assumption. These issues are covered in unique BOMI courses more focused on these aspects of FM to include: Environmental Health and Safety Issues; Fundamentals of Facility Management	Course description from provided link.	No

Category	Sub	Criterion	Assessment	C1	C2	C3	C4	C5	C6	Request clarification	Course coverage notes	Source	
11. Leadership and Innovation	11.3. Innovation	11.3.1.Demonstrate knowledge and ability to investigate ways to improve facility services.	Yes, based on the clarification response from provider, it appears that the course demonstrates knowledge and ability to investigate ways to improve facility services.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate knowledge of implementing changes but does not cover the performance criteria of demonstrating knowledge and ability to investigate ways to improve facility services.	Course does cover tools such as Action Planning to use to impact and investigate ways to change current operations such as facility services. LO 9.5 = Describe how to plan the change process using the action planning and Lewin models. Action planning focuses on identifying the operational need; identifying the steps necessary to address/evaluate the need; looking at alternatives (i.e. consultants/outsourcing); determining timing of implementation	Course description from provided link.	No
		11.3.2.Demonstrate knowledge and ability to assess risks and opportunities.	Partial. It appears the course will demonstrate knowledge and use of planning tools and techniques to monitor information and trends (opportunities) but not assess risks.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate knowledge and use of planning tools and techniques to monitor information and trends relative to your organization - SWOT analysis but does not cover the performance criteria of demonstrating knowledge and ability to assess risks and opportunities.	Extensive discussion is given to use of planning, controlling and decision-making tools in this course. Risk Assessment strategies are more readily identified in BOMI Environmental Health and Safety course as well as the Law & Risk course.	Course description from provided link.	No
		11.3.10. Demonstrate ability to translate innovative ideas into actionable tasks.	Yes, based on the clarification response from provider, it appears that the course demonstrates ability to translate innovative ideas into actionable tasks.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate ability to build a supportive environment and team work but does not cover the performance criteria of demonstrating ability to translate innovative ideas into actionable tasks.	Course does cover tools such as Action Planning to use to impact and investigate ways to change current operations such as facility services. LO 9.5 = Describe how to plan the change process using the action planning and Lewin models. Action planning focuses on identifying the operational need; identifying the steps necessary to address/evaluate the need; looking at alternatives (i.e. consultants/outsourcing); determining timing of implementation. Specific case exercises are provided in the course to challenge students on how to apply ideas to move a facility towards a green certification. This case flows throughout the course		
	11.4. Enterprise Knowledge and Strategic Decision Making	11.4.3.Demonstrate knowledge and ability to drive a "Change Management" process - a structured approach to shifting/transitioning individuals, teams, and organizations from a current state to a desired future state.	Yes, it appears the course skills will meet the performance criteria of demonstrating knowledge and ability to drive a "Change Management" process - a structured approach to shifting/transitioning individuals, teams, and organizations from a current state to a desired future state.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		11.4.4.Demonstrate knowledge and ability to move from the Operational (the who and when of things getting done) to the Strategic (why we do what we do).	Yes, it appears the course skills will meet the performance criteria of demonstrating knowledge and ability to move from the Operational (the who and when of things getting done) to Tactical (what we do) to the Strategic (why we do what we do).	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		11.4.5.Demonstrate ability to strategically allocate all forms of "capital" – human(people), physical(facilities), economic(money) and environmental(land and resources).	Partial. It appears the course will demonstrate ability to strategically allocate people but does not specifically address the other forms of "capital resources" including, facilities, money and environmental.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will discuss how to control resources but does not specifically address the forms of "capital resources" including people, facilities, money and environmental.	Course does include information on people resources allocations moreso than economic and facility. These topics are more thoroughly covered in the BOMI Facilities Planning & Project Management course as well as the Budgeting and Accounting course	Course description from provided link.	No
		11.4.6.Demonstrate ability to provide decision makers with better information about the total long-term costs and consequences of a particular course of action.	Yes, based on the clarification response from provider, it appears the course demonstrates ability to provide decision makers with better information about the total long-term costs and consequences of a particular course of action.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification: It appears the course will demonstrate knowledge in seeking opportunities to achieve goals and types of decisions, operation, and tactical vs strategic decisions and implications, decision-making strategies and tools to evaluate options such as grid analysis but does not cover the performance criteria of demonstrating knowledge and ability to provide decision makers with better information about costs.	Course does include information on short term and long range planning as well as a review of decision-making tools to show decision makers cost. For example, a Grid Analysis is provided that demonstrates a possible weighting approach to determine how to manage a growing department in terms of space (factors evaluated included support, space, cost, etc). LO 7.11 = Describe effective decision-making tools and techniques and show their appropriate use	Course description from provided link.	No

12. Performance Measures	Sub	Requirement	Assessment										
		11.4.7.Demonstrate ability to participate in the organization's strategic planning at the executive level in order to translate between the organization's missions and its facilities portfolio and clearly communicate how real estate and facilities can support these missions.	No, it does not appear that the course demonstrates ability to participate in the organization's strategic planning at the executive level in order to translate between the organization's missions and its facilities portfolio and clearly communicate how real estate and facilities can support these missions.	Yes	Yes	Yes	Yes	Yes	No		Topic is more thoroughly covered in BOMI Asset Management course	Course description from provided link.	No
12. Performance Measures	12.2. Acquiring Data	12.2.4.Demonstrate ability to determine what records provide the "best fit" data for strategic decision making – situation and desired outcome dependent.	Yes, it appears the course skills will meet the performance criteria of demonstrating knowledge and ability to determine what records provide the "best fit" data for strategic decision making – situation and desired outcome dependent.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
	12.3. Establishment and Implementation	12.3.1.Demonstrate knowledge of Performance Measurement concepts (ex. SMART – Specific, Measureable, Actionable, Time-bound) REVIEW - http://www.wbdg.org/resources/measperfsustbldgs.php	Yes, it appears the course skills will meet the performance criteria of demonstrating knowledge of Performance Measurement concepts (ex. SMART).	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		12.3.2.Demonstrate ability to use measures to inform decision-making and resource allocation.	Yes, it appears the course skills will meet the performance criteria of demonstrating ability to use measures to inform decision-making and resource allocation.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		12.3.4.Demonstrate ability to establish baselines from which progress toward attainment of goals can be measured.	Yes, it appears the course skills will meet the performance criteria of demonstrating ability to establish baselines from which progress toward attainment of goals can be measured.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		12.3.5.Demonstrate ability to establish feedback systems to support continuous improvement of an organization's processes, practices, and results (outcomes).	Yes, it appears the course skills will meet the performance criteria of demonstrating ability to establish feedback systems to support continuous improvement of an organization's processes, practices, and results (outcomes).	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No
		12.3.7.Demonstrate understanding that investments in training, and in facilities in general, are not often immediately visible or measurable, but that they are manifest over a period of years.	Yes, it appears the course skills will meet the performance criteria of demonstrating understanding that investments in training, and in facilities in general, are not often immediately visible or measurable, but that they are manifest over a period of years.	Yes	Yes	Yes	Yes	Yes	No			Course description from provided link.	No