

**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](http://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](mailto:AskFMI@gsa.gov).

Initial Review Conducted By: Maria Fara

Initial Review Submission Completion Date: August 30, 2013

Technical Review Conducted By: Mayra Portalatin

Technical Review Submission Completion Date: January 02, 2014

Alignment of Competency with Functional Roles

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|--|--|
| 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](mailto:rbishop@bomi.org)

Title of this training resource: Budgeting and Accounting

Type of training course: Property Management

Does this course provide CEUs (Continuing Education Units) and if so, how many and for what occupation or field? Yes, ACE Credit of 2 semester hours

Learning objective(s) associated with this certificate program course: Analyze and interpret financial statements of prospective tenants, calculate income and expense items, develop capital budgets, write lease abstracts, establish cost controls, construct property and /or facilities budgets.

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: [www.bomi.org/Courses/Budgeting-and-Accounting/](http://www.bomi.org/Courses/Budgeting-and-Accounting/)

**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 |
|----------------------------|-----------------------|--|---|---|---|--|--|-----------------------------------|---|---------------------------------------|---|---|--|
|                            | Systems               | 1.1.2.Demonstrate ability to work with Facilities Team to assess a facility's need for building systems. | No, based on the review of the learning objectives, the skills/materials covered, and the clarification, this course does not address facility team dynamics. | Yes   | Yes   | No   | Yes  | Yes                               | No  |                                       | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website                  |

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|---------------------------------|---|---|---|-----|-----|----|-----|-----|----|--|---|---|---------------------------|
| 1. Management of Facilities O&M | 1.1 Management of Building  | 1.1.5. Demonstrate ability to work with Facilities Team to determine and administer the allocation of building systems' resources.  | Partial. This course received credit for demonstrating knowledge and providing an overview of resource allocation through budgeting. Based on the review of the learning objectives and the skills/materials covered, the topics listed allude to some resource allocation being covered through the budgeting process.                                   | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |
|                                 | 1.2 Management of Building Interior   | 1.2.3. Demonstrate ability to evaluate furniture and equipment performance.   | No, based on the review of the learning objectives, the skills/materials covered, and the clarification, this course does not address ability to evaluate furniture and equipment performances.   | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |
| 4. Energy Management            | 4.4. Coordinate with Public Utilities                                       | 4.4.5. Demonstrate the ability to work with Facilities Team to negotiate rates and discounts.   | Partial. Based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate the ability to negotiate rates and discounts. However, this performance criteria has a local knowledge component that can not be met through training.   | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |
|                                 | 4.5. Planning, Project and Program Management                               | 4.5.4. Demonstrate knowledge and ability to provide planning support for energy budget.   | Partial. Based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate a general ability to provide planning support for energy budget. However, since this performance criteria is intended for energy manager, the course does not cover energy budgets in enough detail for an energy manager. | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |
| Budget and Contracting          | 10.1. Total Cost of Ownership (TCO)   | 10.1.4. Demonstrate knowledge of additional methods for calculating TCO and other economic analyses.<br>Take course - <a href="http://www.wbdg.org/education/lifecyclecosting.php">http://www.wbdg.org/education/lifecyclecosting.php</a> | Yes based on the review of the learning objectives and the skills/materials covered, the topics listed should include knowledge of additional methods for calculating TCO and other economic analyses.  | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |
|                                 | 10.4.1. Demonstrate ability to develop and manage a project/program budget. | 10.4.1. Demonstrate ability to develop and manage a project/program budget.   | Yes based on the review of the learning objectives and the skills/materials covered, the topics listed should include the ability to develop and manage a project/program budget.   | Yes | Yes | No | Yes | Yes | No |  |   | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |

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| 10. Business, Bud | 10.4. Budget Formulation and Exec | 10.4.4. Demonstrate ability to quantify potential for cost savings and cost avoidance. | Yes based on the review of the learning objectives and the skills/materials covered, the topics listed should include ability to quantify potential for cost savings and cost avoidance. | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |
|                   |                                   | 10.4.10. Demonstrate knowledge of invoice/expenditure approval processes.              | Yes based on the review of the learning objectives and the skills/materials covered, the topics listed should include knowledge of invoice/expenditure approval processes.               | Yes | Yes | No | Yes | Yes | No |  | Reference re-submittal of course information. | Learning Objectives, Skills, and learning methods listed in re-submittal. | Course listing on website |