

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: August 30, 2013

Technical Review Conducted By: Steve Grant

Technical Review Submission Completion Date: October 23, 2013

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: International Facility Management Association

Provider address information (primary physical location, including address, city, state, zip code): International Facility Management Association, 800 Gessner Road, Suite 900, Houston, TX 77024 USA

Provider's primary point of contact for this learning resource (name, primary physical location (if different from provider address information), phone, and email):

Title of this training resource: Finance and Business, Facility Management Professional (FMP)

Type of training course: The FMP is an assessment-based certificate program based on the 4 most heavily-weighted competency areas determined by IFMA's Global Job Task Analysis: Finance and Business, Operations and Maintenance, Leadership and Strategy, and Project Management. Each course is followed by a 50-question online final assessment. Successful completion of all four final assessments qualifies candidates for the FMP credential.

Does this course provide CEUs (Continuing Education Units) and if so, how many and for what occupation or field: In the self-study format, this course earns 0.9 CEUs; the instructor-led course earns 1.9 CEUs. IFMA is an IACET Approved Provider so many related fields accept IFMA CEUs, i.e., Facility Management, Interior Design, Architecture and so forth.

Learning objective(s) associated with this training course: **FMP - Finance and Business Learning Objectives**

Chapter 1: Finance and Business in the Facility Organization

After completing this chapter, students will be able to:

- Summarize the reasons why finance and business management are key ingredients in the success of facility management.
- Define key finance terms prevalent in facility management.
- Explain basic accounting principles and practices that underpin facility management operations.

Chapter 2: Financial Management of the Facility Organization

After completing this chapter, students will be able to:

- Develop, recommend and manage/oversee the facility budget.
- Identify the basic financial statements an organization prepares and describe the elements impacted by facility management operations.
- Write business cases, supporting documentation and financial reports.
- Apply cost concepts in facility management operations.
- Use financial ratios and facility metrics to analyze and interpret financial documents.
- Identify cost-containment opportunities.
- Explain the use of chargebacks to allocate facility costs.

Chapter 3: Procurement in the Facility Organization

After completing this chapter, students will be able to:

- Apply procurement principles and procedures in compliance with the organization's policies and guidelines.
- Analyze an outsourcing proposal.
- Describe the fundamental aspects of customary facility management outsourcing relationships.

Chapter 4: Contracts in the Facility Organization

After completing this chapter, students will be able to:

- Identify the principles involved in the development and oversight of facility management contracts.
- Develop Key Performance Indicators.
- Administer contracts.
- Monitor contractor performance.
- Analyze and interpret financial contract elements.
- Resolve vendor conflicts.

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): This course is available in either a self-study format or as an instructor-led classroom course. Each student receives a printed course manual (either hard copy or e-book) and access to the online portal which offers activity-based learning, flashcards, case studies, chapter quizzes, and the final assessment. Students taking the instructor-led course also have access to the PowerPoint slides used by instructors to reinforce content. Those taking the self-study format should be self-motivated and able to learn by reading the material, answering progress check questions and completing chapter quizzes, and by taking advantage of the additional material available in the portal. Students in the classroom have those components available in addition to having the benefit of instructor lectures and slides, as well as class discussions and additional learning activities.

Length of training (in hours): At conferences or events and by chapters, the instructor-led version of this course is two full days in length, plus reading to be done outside the classroom. Colleges and universities which offer this course determine their own schedule, usually a few hours per week over a quarter or semester. Completion of the self-study course varies according to the individual, but commonly takes at least ten hours.

URL link to information about the training course, content, and/or syllabus: <http://www.ifmacredentials.org/fmp/>

Please note:
FMP certificate program does not include observable assessment of candidate performance, demonstration per se is not possible.

* Most of the FBPTA performance criteria ask for some kind of "demonstration" of ability, knowledge, familiarity and so forth. Since the

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
3. Technology	3.1. Technology Solutions	3.1.3. Demonstrate ability to identify evaluation criteria, evaluate, and recommend facility management technologies solutions.	No, based on the review of the learning objectives and the skills/materials covered, the course does not demonstrate ability to identify evaluation criteria, evaluate, and recommend facility management technologies solutions.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification. It is not clear that Learning Objective and the skills/material provided address Demonstrate ability to identify evaluation criteria, evaluate, and recommend facility management technologies solutions. It's not clear how identifying cost containment opportunities relates to FM Technology solution. Request clarification and course content relevant to this specific performance criteria.	Please see F&B Exhibits 3.1.3. Since this is a finance and business course, the material covers methods of evaluating all manner of FM purchases, not specifically technology solutions.	Exhibit material provided by course provider	Yes
3. Technology	3.3. Maintenance Management System (MMS)	3.3.2. Demonstrate ability to operate Maintenance Management Systems and Computerized Maintenance Management Systems.	No, based on the review of the learning objectives and the skills/materials covered, the course does not demonstrate ability to operate Maintenance Management Systems and Computerized Maintenance Management Systems.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification. It is not clear that learning objective and skills/material address: demonstrate understanding of MMS and CMMS. Request clarification and course content relevant to this specific performance criteria.		None	No
	Management	4.5.4. Demonstrate knowledge and ability to provide planning support for energy budget.	No, based on the review of the learning objectives and the skills/materials covered, the course does not address knowledge and ability to provide planning support for energy budget.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification. It is not clear that the learning objective and the skill/material address: demonstrate knowledge and ability to provide planning support for energy budget. It's not clear how the submission relates to energy reduction opportunities. Request clarification and course content relevant to this specific performance criteria.		None	No

4. Energy Management	4.5. Planning, Project and Program Mar	4.5.5. Demonstrate knowledge and ability to identify and develop low-cost and no-cost energy efficiency opportunities.	No, based on the review of the learning objectives and the skills/materials covered, the course does not address knowledge and ability to identify and develop low-cost and no-cost energy efficiency opportunities.	Yes	Yes	Yes	Yes	Yes	Yes	Request clarification. It is not clear that the learning objective and the skill/material address: Demonstrate knowledge and ability to identify and develop low-cost and no-cost energy efficiency opportunities. It's not clear how the submission relates to energy reduction opportunities. Request clarification and course content relevant to this specific performance criteria.	None	No
		4.5.7. Demonstrate knowledge and ability to develop and assist in project identification and justification.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge and ability to develop and assist in project identification and justification.	Yes	Yes	Yes	Yes	Yes	No		None	No
	10.1. Total Cost of Ownership (TCO)	10.1.2. Demonstrate knowledge that the TCO is best determined through Life-Cycle Cost Analysis (LCCA) for facilities. Take course - http://www.wbdg.org/education/lifecyclecosting.php	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge that the TCO is best determined through Life-Cycle Cost Analysis (LCCA) for facilities.	Yes	Yes	Yes	Yes	Yes	No		None	No
		10.1.3. Demonstrate knowledge of how to find and calculate the basic costs required for an LCCA. Take course - http://www.wbdg.org/education/lifecyclecosting.php	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of how to find and calculate the basic costs required for an LCCA.	Yes	Yes	Yes	Yes	Yes	No		None	No
		10.1.4. Demonstrate knowledge of additional methods for calculating TCO and other economic analyses. Take course - http://www.wbdg.org/education/lifecyclecosting.php	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of additional methods for calculating TCO and other economic analyses.	Yes	Yes	Yes	Yes	Yes	No		None	No
	10.3. Contracting	10.3.2. Demonstrate knowledge of rules and requirements for purchasing products and services.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of rules and requirements for purchasing products and services.	Yes	Yes	Yes	Yes	Yes	No		None	No
		10.3.5. Demonstrate knowledge of and ability to effectively govern/oversee a contract to ensure compliance and full value of the service or product being provided.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of and ability to effectively govern/oversee a contract to ensure compliance and full value of the service or product being provided.	Yes	Yes	Yes	Yes	Yes	No		None	No
	Simulation and Execution	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 demonstrate ability to develop and manage a project/program budget.	Yes	Yes	Yes	Yes	Yes	No		None	No

10. Business, Budget and Contracting	10.4. Budget For	10.4.2.Demonstrate knowledge of budget submission requirements.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of budget submission requirements.	Yes	Yes	Yes	Yes	Yes	No			None	No
		10.4.3.Demonstrate knowledge of historical budget records and costs and how to use in forecasting.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of historical budget records and costs and how to use in forecasting.	Yes	Yes	Yes	Yes	Yes	No			None	No
		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 demonstrate ability to quantify potential for cost savings and cost avoidance.	Yes	Yes	Yes	Yes	Yes	No			None	No
		10.4.6.Demonstrate ability to identify quantitative and qualitative risks.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to identify quantitative and qualitative risks.	Yes	Yes	Yes	Yes	Yes	No			None	No
		10.4.7.Demonstrate ability to advocate for funding using economic analysis. REVIEW - http://www.wbdg.org/design/use_analysis.php	No, based on the review of the learning objectives and the skills/materials covered, the course does not include the federal specific whole building design guide information on the ability to advocate for funding using economic analysis.	Yes	Yes	Yes	Yes	Yes	No			None	No
		10.4.9.Demonstrate ability to manage operating budget and produce required financial reports.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to manage operating budget and produce required financial reports.	Yes	Yes	Yes	Yes	Yes	No			None	No
		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 demonstrate knowledge of invoice/expenditure approval processes.	Yes	Yes	Yes	Yes	Yes	No			None	No
		10.4.12. Demonstrate ability to conduct periodic financial reviews and produce required reports.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to conduct periodic financial reviews and produce required reports.	Yes	Yes	Yes	Yes	Yes	No			None	No
	in and Administration	11.1.1. Demonstrate ability to communicate clearly.	No, based on the review of the learning objectives and the skills/materials covered, the course does not demonstrate ability to communicate clearly addressing the items outlined as necessary for clear communication.	Yes	Yes	Yes	Yes	Yes	No			None	No

11. Leadership and Innovation	11.1. Communicatio	11.1.3. Demonstrate ability to perform administrative duties.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to perform administrative duties.	Yes	Yes	Yes	Yes	Yes	No			None	No
	11.2. Personnel	11.2.1. Demonstrate knowledge and ability to ensure corporate, life safety, and regulatory compliance.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge and ability to ensure corporate, life safety, and regulatory compliance.	Yes	Yes	Yes	Yes	Yes	No			None	No
		11.4. Enterprise Knowledge and Strategic Decision Making	11.4.5. Demonstrate ability to strategically allocate all forms of "capital" – human(people), physical(facilities), economic(money) and environmental(land and resources).	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to strategically allocate all forms of "capital" – human(people), physical(facilities), economic(money) and environmental(land and resources).	Yes	Yes	Yes	Yes	Yes	No			None
	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 review of the learning objectives and the skills/materials covered, the topics listed should demonstrate 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	No			None	No
	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.		Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should 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.	Yes	Yes	Yes	Yes	Yes	No			None	No
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, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate 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			None	No	
	12.3.2. Demonstrate ability to use measures to inform decision-making and resource allocation.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to use measures to inform decision-making and resource allocation.	Yes	Yes	Yes	Yes	Yes	No			None	No	

12. Performance Measures	12.3. Establishment and Implementation	12.3.3. Demonstrate knowledge of cascading Key Performance Indicators (KPI) that can be used to measure how well mission, management, program and individual goals are being met. REVIEW - http://www.wbdg.org/design/meet_performance.php	No, based on the review of the learning objectives and the skills/materials covered, the course does not demonstrate knowledge of cascading Key Performance Indicators (KPI) that can be used to measure how well mission, management, program and individual goals are being met as identified in the whole building design guide reference.	Yes	Yes	Yes	Yes	Yes	No			None	No
		12.3.9. Demonstrate knowledge of current portfolio-level performance indicators.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate knowledge of current portfolio-level performance indicators.	Yes	Yes	Yes	Yes	Yes	No			None	No
		12.3.10. Demonstrate ability to understand a base set of key performance indicators for measuring the outcomes of investments and the data required for them.	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to understand a base set of key performance indicators for measuring the outcomes of investments and the data required for them.	Yes	Yes	Yes	Yes	Yes	No			None	No
		12.3.11. Demonstrate ability to understand, provide input for, and use additional key performance indicators (KPIs) developed by organization to measure the qualitative aspects of facilities operations and management: REVIEW - http://www.wbdg.org/resources/fpe.php?r=engage_process	Yes, based on the review of the learning objectives and the skills/materials covered, the topics listed should demonstrate ability to understand, provide input for, and use additional key performance indicators (KPIs) developed by organization to measure the qualitative aspects of facilities operations and management.	Yes	Yes	Yes	Yes	Yes	No			None	No