

BOC Level I Course Manager (CM) Procedures, Checklist and Announcements BOC Partners 2024

This Procedures document is for Partners who **are** using the BOC Learning Management System (LMS):
<https://elearn.theboc.info>

Procedures related to 'in person' class delivery are italicized

CLASS MATERIALS

All Classes:

- o **Sign-in Sheet** (*1 for each day for welcome table*)
- o **Student Handbooks** (1 per student + additional 5 for drop-ins, etc.)
- o **GBCI Roster (applies to all classes *except* for elective)** (*1 for welcome table*) – Download from **the BOC Repository: Level I Course Management: Continuing Education**
- o **Extension cord**
- o **Extra pens, markers, small post-it notes and tape**

1001 Class:

- o **Name Tags** (*1 per student, instructor, and CM, additional 5 for drop-ins, etc.*) – CM to provide if desired
- o **Project Workbooks** (1 per student + additional 5 for drop-ins, etc.) – Available from online book order site or via download from the **BOC Repository: Level I Curriculum: Level I Project Workbook**
- o **Course Syllabus** (1 per student + additional 5 for drop-ins)
- o **Classroom Requirements Checklist** – Available for download from the **BOC Repository: Level I Course Management: Forms**

1002 Class:

- o **Portfolio Manager Overview and/or Portfolio Manager 101** – optional material to email to students. Can be downloaded from the **BOC Repository: Level I Curriculum: BOC 1002**.

1005 Class:

- o **BOC Certification Exam Level I Slides**– Access the 'BOC-CM-Cert-Exam-Slides-L1' from the **BOC Repository: Level I Course Management: Procedures** and email to students prior to class, or *make a copy for each student plus an additional 5 for drop-ins.*
- o **Certification Display Packet** showing *Training Certificate of Completion (TCOC) and Certified Building Operator (CBO) letters and wallet cards, plus pin and patch. The Course Manager can request one from the BOC office if needed (Not required for courses using virtual delivery.)*

Last Class:

- o **CM Course End Summary Form** – Download 'CM-Course-End-Summary-Final' from the **BOC Repository: Level I Course Management: Forms**.
- o **BOC Maintenance of Credential (MOC) Info Sheet** – Download 'CM-MOC-FAQ-Last-Class' from the **BOC Repository: Level I Course Management: Forms**. Email to students prior to the last class *or make a copy for each student.*

PROCEDURES FOR ALL CLASSES

Course Managers should use 'bcc' for all email communications to groups of students.

At least one week prior to each class:

- *Contact the site facility to confirm the reservation of the classroom, time and any AV equipment that are needed (e.g. projector, white board, etc.)*
- *Contact the caterer (if food will be provided) to confirm the date, times (breakfast, lunch & snack), and the head count (at least total # of students + instructor + Course Manager)*
- *Confirm you have enough student handbooks for the number of people registered, plus several extras for walk-ins and make-ups.*
- *Confirm with the instructor (and copy the class moderator if you will not be moderating the class) and provide them with your contact info (and/or the moderator's info if the CM will not be moderating) for the day of class (example template below). Make sure they reply and call them if needed. Determine if they have any additional A/V needs or materials for class. Confirm they will be using the latest version of the student handbook/PPT from the repository.*

Hi [instructor name],

My name is [CM name] and I am the course manager for the BOC class you are teaching next [day, date]. [Moderator name] will be moderating. Please let us know if you would like to use any polls and we can get those set up in the zoom meeting. If you have any other requests or questions before the class, we can help with that as well. A friendly reminder to please use the latest version of the class handbook/PPT from the BOC Repository.

[Moderator name] will reach out to you with their cell phone number and will request yours, so that there's a way to be in contact the day of class if need be.

I am adding the zoom link and password below for your convenience.

[Copy and paste invites below, sample provided here]

The BOC Program (D) is inviting you to a scheduled Zoom meeting.

Topic: 1003 part 1 with Alan Suleiman CA-24-L1-SDGE LS02

Time: Oct 19, 2024 08:30 AM Pacific Time (US and Canada)

Join Zoom Meeting

<https://>

Meeting ID: XXXX

Passcode: XXXX

On the class day:

- *If moderating the class: use the 'Virtual BOC Course Moderator Info and Procedures' document from the **BOC Repository: Virtual Course Delivery**. Follow the instructions to launch and co-host the Zoom meeting.*
- *Arrive at the site a minimum of 30 minutes early (one hour is best) to set up the training room, including enough seats for students and AV equipment.*
- *Set up a "welcome" table near the door and with the following:*
 - **Sign-in Sheet**
 - **Student Handbooks** – Give to students to use during class and to keep.
 - **GBCI Roster (for 1001-1006 classes)** – Students wanting maintenance credit for their LEED certifications must sign the roster.
- *Test and Evaluation Distribution: At the end of the day when the instructor advises, students should take the class test via the LMS in the classroom on their phone, laptop, or other device. Students should direct their questions during the test to the instructor.*

- During the class day, the instructor will review the previous class project assignment with students (as applicable). Before the end of the day, the instructor should preview the assignment associated with this class day.
- The instructor or CM should also direct the students to complete the Class Evaluation via the LMS. Students should complete the evaluation *in the classroom* at the end of the class day.

After each class:

- A few days after class, check the LMS Gradebook to make sure students have taken the class test. Reach out to students who have fallen behind with a reminder.
- Test retakes: If a student fails a test (below 70%), they can retake the test on the LMS. Students are limited to 3 test attempts. If they still have not passed the test after 3 attempts, the CM can notify them which questions they got wrong to help guide studying. CMs should check with Katherine Morgan (support@katherinemorgan.net) to allow the student to take the test additional time(s).
- Assignments: If an assignment was due that class, review and grade the assignments submitted via the LMS. Reach out to any students who scored below 70% on the assignment with feedback and instruct them to correct and resubmit the assignment.
- Class Make-ups: If a student misses a class, they can view the class recording on the LMS and take the test at a convenient time.
- If you find errors in student handbooks, project workbooks, PowerPoints, tests, and answer keys, please submit the information using the "CurriculumFeedback-TestTrackingForm" located in the **BOC Repository: Level I Course Management: Forms**. Follow directions on the spreadsheet and submit by May 31 of each year.
- Evaluation Summaries: A few days after class, check the Class Evaluation Entries in the LMS. If most students have completed the Evaluation, copy and paste Survey Results into the Evaluation Summary Excel workbook (Katherine Morgan can provide). If many students have not yet completed the evaluation, send a reminder to the students and wait for additional entries before creating the evaluation summary. When the majority of students have completed the evaluation, create a PDF of the class evaluation summary.

UNIQUE PROCEDURES BY CLASS

1001:

- **One week prior** to the 1001A class, Building Potential suggests you prepare a Course Syllabus and an Excel workbook with the following documents:
 - o Sign-in sheets for each class
 - o ID List by Student Name
 - o Registration List (for your reference)
- **Several days prior** to the 1001A class, Building Potential suggests you send the students a welcome email and attach the course syllabus, BOC webinar series information (<https://www.theboc.info/continuing-education/webinars/>), BOC Program Guide (**BOC Repository: Level I Course Management: Forms**), LMS Getting Started file (**BOC Repository: Level I Course Management: Procedures**), and LMS log-in information (check with Katherine Morgan about most up-to-date LMS log-in information). For the webinar series information, note in the email that there is no cost for current students, and they can use 'STUDENT' as a discount code when registering.
- **On the 1001A class day:**
 - o *Complete the **Classroom Requirements Checklist** (available for download from the BOC Repository), if helpful.*
 - o *Hand out other first class materials in addition to the Student Handbook, including the Project Workbook and other course handouts as applicable.*

- o At the beginning of the class, greet the students and deliver the following announcements:

Explain your role as Course Manager:

- You are there to help them have a successful experience with the program and to support them in earning their credential.
- You are their point of contact for questions, missed classes, project assignments and make-up tests.
- You will be consistently available throughout the course series and will attend some/all classes, while instructors may change.

Present introductory slides posted to the LMS Level One Introduction page: 'BOC Level I Course: Course Format and Completion Requirements.' These are also available in **BOC Repository: Level I Course Management: Procedures**. Slides may be customized by each CM to include pertinent contact information and unique details for each course. CMs may also provide a live demonstration of the LMS. Generally, the slides and LMS overview should cover:

- Attendance policy and makeup options
- Class format
- Tests, including how to access tests on the LMS
- Evaluations, including how to access evaluations on the LMS
- Assignments, including how to submit assignments on the LMS
- How to track progress with course requirements on the LMS
- Eligibility, credential structure, and the Training Certificate of Completion (TCOC) / Certification application: Successful completion of training results in a TCOC. There is an optional Certification Exam to earn the Certified Building Operator credential after the series is over. Further details will be provided later in the series.
- Credential Maintenance

Review the Course Syllabus. Remind students you emailed it to them prior to class. They can also access the syllabus on the LMS on the Level One Introduction materials page. Review class dates and topics and advise them if the class schedule is also available online. Students will always be notified if dates change.

Review the BOC Program Guide. This is also available on the LMS on the Level One Introduction class page.

Review the following items/show items on "welcome table"

- *Sign-in sheet: This will be on the welcome table for each class. Students need to review the contact info provided, make any changes, and initial their attendance.*
- *GBCI Roster: This will be on the welcome table for 1001-1006 classes. Students who want maintenance credit for their LEED certification need to sign the roster before the end of the day.*
- Student Handbooks: Each student can take one to use in class and to keep.
- Project Workbooks: These contain their homework assignments for the entire series.
- Review any additional supplemental materials.

Encourage the students to follow BOC on Facebook, Linked-In and the BOC Blog. Links are in the BOC Program Guide and on the BOC website.

Encourage students to fill out the Student Introduction Survey in the LMS.

Introduce the instructor, who will kick off the day's curriculum.

- After Lunch, the instructor should introduce the Project Workbook, including:
 - o Advise the students to fill in the information on Page 1 today, especially your name and location.
 - o Review the five assignments.
 - o Summarize the Project Scorecard. Again, fill in your name and class location.

- o Share that the students will upload the projects to the LMS, and the Course Manager will review the assignment(s) and provide grades via the LMS.
- o Announce that there is sample data in the LMS for students to use if they cannot obtain the necessary information to complete assignments for their facility.
- **On the 1001B class day:**
 - o Review the BOC webinar series information on the BOC website: <https://www.theboc.info/continuing-education/webinars/>. Share that BOC offers technical webinars that are free to all current students using the code STUDENT. This is a \$300 value.
 - o Advise students that they will need to access their company's electricity bills for the project in the next class (1002). When they go back to work, they need to ask their supervisor about this. If there is a problem, they should let the CM know.

1005:

- Prior to the 1005 class, send an email to those who are registered for the exam with a reminder of the exam logistics.
- During the 1005 class, review the slide presentation 'BOC-CM-Cert-Exam-Slides-L1' with the class in the **BOC Repository: Level I Course Management: Procedures**, which explains credential options: Training Certificate of Completion (TCOC) upon course completion or BOC Certification (CBO) upon passing the Certification Exam. Point students to the "Preparing for the Exam" page of the BOC website (<https://www.theboc.info/certifications/exam/preparing-for-exam/>) which provides exam prep webinars, free resource guides and an informational webcast.
- Share that BOC has a Certification Exam webpage that includes extensive information about the exam: <https://www.theboc.info/certifications/exam/>.
- Advise students that everyone who is eligible to receive the TCOC (completed coursework, meets work/education experience requirements, paid tuition in full and completed the TCOC/certification application) will receive the TCOC which includes a letter and wallet card. They will also be sent an email providing information about how to register for the exam and take it. Explain that if anyone has not yet met the education/experience requirement, they should still submit their TCOC Application, and it will be 'held' until they have met the requirement and then processed at that time.
- Show the certification display packet: Certificate, lapel pin OR patch, and wallet card. Advise that students who earn the TCOC will receive the corresponding letter and wallet card; those who successfully pass the exam (earning their CBO) will receive the corresponding letter, wallet card, and their choice of a clothing patch or pin.

1006:

- Review the TCOC/Certification Application with the students, located in the LMS on the 1006 Assignment page. Explain each section briefly and be sure to highlight that a supervisor's signature is required on Page 2 of the form. Students will need to complete the application and upload it to the 1006 Assignment page as their final project assignment or email it to the CM.
- Review the **Back on the Job** section of the 1006 Assignment page. Instruct students to complete the online form by describing two actions they can take back on the job that will help their organization save energy, and a target date to complete them. If possible, the instructor or Course Manager engages students in a brief discussion in which they are invited to share the activities they may include in the form.
- Remind students that their project assignments, including the TCOC/Certification Application and Back on the Job form, should be submitted via the Learning Management System (LMS). As an alternative, students can scan and submit assignments to the CM by email.

Last Class:

- Remind students that BOC also offers a Level II course series. Inform students of any upcoming Level II series in the area and encourage them to consider taking a Level II course.
- *Distribute and review* the **BOC Credential Maintenance Info Sheet**. Advise that there is a maintenance component to the TCOC and BOC Certification, and that the application process will begin in January two years after the TCOC or certification date and thereafter on an annual basis. Maintenance points need to be earned in the year prior to the application process. Students should read through the Info Sheet and come to you during break or after the series ends if they have any questions.
- Remind students that any outstanding project assignments, including the TCOC/Certification Application should be submitted via the LMS. As an alternative, students can scan and submit assignments to the CM by email.

After the Last Class:

Complete the LMS Close-out Procedures:

- Download TCOC/Certification Applications and check for completeness:
 - Contact information with home or work mailing preference. It is important that both work and home fields are completed. Even if the student prefers to have their materials to be mailed to their home address, a copy of the certification letter will be mailed to their supervisor at the work address.
 - Area codes and appropriate zip code information
 - Complete work history information including dates of employment (month and year). If the student selects the work **and** education option to qualify for certification, the education portion of the application should be completed as well. Course Managers should make sure the student has documented two full years of work experience and/or education.
 - The supervisor or human resources personnel has signed the application. A student's own signature is not valid in this area of the application.
 - Student signatures on applications verifying information is preferred.
 - Applications are NOT required to include reference information and will be processed if this information is not included on the application. Newer applications do not have a reference section on application.
 - Level I Eligibility:
 - Two or more years of experience working in operations and maintenance of a commercial, industrial or institutional facility, **OR**
 - A minimum of one year of experience working in operations and maintenance of a commercial or institutional facility **AND** a BOC Fundamentals of Energy Efficient Building Operations certificate or one year of technical college level education in a facilities engineering related program, **OR**
 - Two or more years of experience in energy management of facilities with a focus on operations and maintenance.
 - **If anything is missing, please ask the student to complete the form.** If they are missing the supervisor's signature, advise them that we need it to process the application and ask them to get it and resubmit the application via the LMS.
- Save the TCOC/Certification Applications to a folder on your hard drive. Mark approved in Assignment view.
- Confirm student course work is complete, and update Course Progress to show course complete
 - See: Group Administration > List Users > Report (for each student)
 - Open to show details and make sure it shows course is complete
- On the full gradebook for the group/cohort, export the Gradebook Component grades.
- Email the following materials to Amy Price:
 - A PDF of the student roster / gradebook so that she can verify completion of course requirements.
 - PDFs of the TCOC/Certification Applications. Please include which course they are associated with and list the applications in two groups:
 - one for students who are eligible for their TCOC

- one for students who are not yet eligible for their TCOC
- Eligible students' TCOC materials will be mailed directly to the student within 45 days unless directed otherwise.
- Once a student who originally had incomplete coursework satisfies coursework requirements, the Course Manager should notify Amy Price that the student is ready to be processed for their TCOC.
- Complete the Course End Summary form in the **BOC Repository: Level I Course Management: Forms** and email it to your Administrator.
- Complete the Curriculum Feedback Test Results Tracking form in the **BOC Repository: Level I Course Management: Forms** and email it to Melissa Sokolowsky and the BOC Help Desk.

Contact Information

BOC Team	Job Title/ Role	Mailing Address	Email	Phone
Julie Brown	Course Scheduling & Logistics, Handbook Management	1200 12 th Avenue South, Ste. 110 Seattle, WA 98144	julie.brown@buildingpotential.org	206-343-3960
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