

BOC Level I - Partners

Course Manager (CM) Procedures, Checklist and Announcements

2024

This document applies to BOC Partners who are **not** using the BOC Learning Management System (LMS)

CLASS MATERIALS

Adapt these items to the virtual delivery environment as needed

All Classes:

- o **Sign-in Sheet** (1 for each day for welcome table)
- o **Student ID Number List** (1 printout for welcome table)
- o **Student Handbooks** (1 per student + additional 5 for drop-ins)
- o **Test Booklets and Answer Sheets** (1 per student + additional 5 for drop-ins, etc.) – If previously used, review them to ensure they do not have any marks in them. Download from [the BOC Repository: Level I Curriculum](#)
- o **Test Booklet Answer Keys from Previous Class** (as applicable, 2 or 3 copies for easier student viewing). Download from [the BOC Repository: Level I Curriculum](#)
- o **Test and Assignment Results by ID Number** (as applicable, 1 printout for welcome table)
- o **Evaluation Forms** (1 per student + additional 5 for drop-ins) Download from [the BOC Repository: Level I Course Management: Forms](#)
- 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**
- o **Magazines or publications of interest** – *optional*

1001 Class:

- o **Name Tags** (1 per student, instructor, and CM, additional 5 for drop-ins) – CM to provide if desired
- o **Project Workbooks** (1 per student + additional 5 for drop-ins) – 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 TCOC and CBO letters and wallet cards, plus pin and patch. CM can request one from the BOC office if needed (Not required for courses using virtual delivery.)

1006 Class:

- o **Training Certificate of Completion/Certification Application** - (at least 1 per student) - Available for download from the [BOC Repository: Level I Course Management: Forms](#)

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 Credentials (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

Procedures related to ‘in person’ class delivery are italicized

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 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 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.*
- Prepare a list of previous class test and assignment grades by ID #, as applicable. List should only provide student ID #s and grades. Do not include names for privacy purposes. Email to students so they can track their progress.
- 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 John Smith CA-21-L1-SDGE LS02

Time: Oct 19, 2021 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 current version of ‘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** - *Students should review information, make changes, and initial attendance.*
 - **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 Booklet Answer Keys from Previous Class** (as applicable)
 - **Student ID List**
 - **Test and Assignment Results by ID Number** (as applicable)
- **Test and Evaluation Distribution:** At the end of the day when the instructor advises, distribute the test booklets, answer sheets and evaluation forms to students, or direct them to your organization’s Learning Management System (LMS) if using one. Students should direct their questions during the test to the instructor. Have students turn in completed test booklets, answer sheets and evaluation forms to the Course Manager for grading and compiling between class dates.
- 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.

After each class:

- Grade the tests. If more than half of the class gets a question wrong, count the missed question(s) as correct for everyone.
- Compile the class evaluations.
- **Class Make-ups and Test Retakes:** Class lecture recordings and tests are now accessible in Building Potential’s BOC “elearn” Learning Management System (LMS) for all core classes and several electives, and the LMS will be used for class make-ups and test retakes. Students may use the recorded elective class/test in place of their scheduled elective even if it is a different class topic (i.e. student was scheduled for BOC 1011, and that one is not available for make-up). If a student misses a class, please refer them to the attendance policy which includes no more than two class absences. Students need to retake a test if they scored below 70%. To make up a class or retake a test, students need to be added to the LMS to access the class recording and tests. Please forward their name, email address, phone number and which course they are attending to Katherine Morgan at support@katherinemorgan.net. An account will be set up for the student in the LMS and directions will be provided to them for accessing the relevant materials (class recording, test, and/or project assignment, including the direction that the student needs to forward their test results to you to update your records). A student can retake a test a total of three times. If a student has technical issues with the LMS, please forward these to Katherine Morgan at support@katherinemorgan.net.
- **Assignments:** If an assignment was due that class, review and grade the assignments. Reach out to any students who scored below 70% on the assignment with feedback and instruct them to correct and resubmit the assignment.
- Report any issues and opportunities to your administrator related to your observations of instructor and student performance and feedback during the class sessions. If you find errors in student handbooks, project workbooks, PowerPoints, tests, and answer keys, please submit the information using the “CurriculumFeedbackTestTrackingForm” located in the **BOC Repository: Level I Course Management: Forms**. Follow directions on the spreadsheet and submit by May 31 of each year.

UNIQUE PROCEDURES BY CLASS

1001:

- **One week prior** to the 1001A class, Building Potential suggests you prepare an Excel workbook containing the following:
 - Sign-in sheets for each class (see instructions below)
 - ID List by Student Name
 - 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 syllabus, BOC webinar series information (<https://www.theboc.info/continuing-education/webinars/>), and BOC Program Guide (**BOC Repository: Level I Course Management: Forms**). 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:**
 - *Hand out other first-day-of-class materials in addition to the Student Handbook, including the Project Workbook and other course handouts as applicable.*
 - 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 'BOC Level I Course: Course Format and Completion Requirements.' in the **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. Generally, the slides should cover:

- Attendance policy and makeup options
- Class format
- Tests
- Evaluations
- Assignments – mention there is sample building data for all assignments that students may use if they have trouble obtaining their own building data
- How to track progress with course requirements
- 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. Review class dates and topics and advise them that the class schedule is also available online. Note that students will always be notified if dates change.

Review the BOC Program Guide found on the **BOC Repository: Level I Course Management: Forms**.

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.

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

- After lunch, the instructor should introduce the Project Workbook, including the info below. If project work will be completed using your organization’s LMS, provide information to the students on how to submit their assignments.
 - Advise the students to fill in the information on Page 1 today, especially your name and course location or number.
 - Review the five assignments.
 - Summarize the Project Scorecard. Again, fill in your name and class location.
 - Share that the students will submit their assignments to the Course Manager, and the Course Manager will typically review the assignment(s) and provide grades by the following class.
 - Remind students that sample building data is available by request if they cannot obtain the necessary information to complete assignments for their facility.
- **On the 1001B class day:**
 - 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.
 - *Route the exam registration list and advise students to review the list.* If students have registered for the exam, they need to prepare to take the exam as follows: The 120-question exam is administered on a computer, generally at a testing site, in-person or online, and is a closed-book exam. It is based on the training as well as on-the-job tasks performed by operators. They should also review the candidate handbook online. Those who have not registered for the exam can do so after completing the course and earning their TCOC. For virtual classes, tell students that they can contact the CM if they are unsure of their exam registration status and would like to know.
 - 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.
- Review the slide presentation ***BOC Certification Exam Level I Slides*** in the **BOC Repository: Level I Course Management: Procedures** with the class, 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 BOC Preparing for the Exam page (<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 select an exam site and date or take the exam virtually, if they have already registered and paid for the exam. Students who have not yet registered and paid for the exam will receive information about registering for the exam upon completing their TCOC.
- 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:

- *Distribute the TCOC/Certification Application in the **BOC Repository: Level I Course Management: Forms** to the students, or for an online course, email it to the students. Explain each section of the application briefly during class 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 submit it to the CM as their final project assignment.*
- Remind students that their project assignments, including the TCOC/Certification Application, should be submitted to the CM by the end of the course series.

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 FAQ document in the **BOC Repository: Level I Course Management: Forms**. 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 FAQ document 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 to the CM by email.

After the Last Class:

- Review TCOC applications for completion; follow-up with students on any blank or missing fields. Ensure that their supervisor has signed where appropriate.
- Review collected TCOC/Certification Exam applications. Applications should be separated into two groups:
 - One for students who are eligible for their TCOC (they meet the eligibility requirements, have completed all tests and projects with a grade of 70% or greater, and have submitted a complete TCOC application)
 - One for students who are not yet eligible for their TCOC (those with outstanding work to complete or tests to retake, or who do not yet meet the eligibility requirements; but they must have a complete TCOC application)
- 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, send the application to Amy noting that the student is ready to be processed for 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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