

# BOC Level II - Partners

## Course Manager (CM) Procedures, Checklist and Announcements

### 2024

*This document applies to BOC Partners who **are** 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)
- o **Student Handbooks** (1 per student) – Contact Julie Brown for order instructions
- o **Extension cord**
- o **Extra pens, markers, small post-it notes and tape**

### 2001 Class:

- o **Name Tags** (1 per student, instructor, and CM) – CM to provide if desired
- o **Project Workbooks** (1 per student) – Available from online book order site or via download from repository
- o **Classroom Requirements Checklist** – Download from the [BOC Repository: Level II Course Management: BOC Partner Files: Forms](#)

### 2005 Class:

- o **CM Course End Summary Form** – Download ‘CM-Course-End-Summary-Final.1.0’ from the [BOC Repository: Level II Course Management: BOC Partner Files: Forms](#)
- o **BOC Credential Maintenance Info Sheet** – Download ‘CM-MOC-FAQ-Last-Class’ from the shared [BOC Repository: Level II Course Management: BOC Partner Files: Forms](#). Email to students prior to the last class, or make a copy for each student.

## PROCEDURES FOR ALL CLASSES

### 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 extra.
- Confirm the class time and date with the instructor. If using virtual delivery, copy the class moderator if you will not be moderating the class, and provide the instructor 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 the instructor replies 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 BOC 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: 2002 part 1 with Alan Suleiman CA-24-L2-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 virtual: access the 'Virtual BOC Course Moderator Info and Procedures - Partners' document from the [BOC Repository: Virtual Course Delivery](#). Follow the instructions to launch and co-host the Zoom meeting.
- If in-person:
  - 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.
      - **Single Class Participants** - Students who are attending this class as a single class should write in their name if it is not on the sign-in sheet. Provide them with class materials. After the class is over, communicate attendee information to the BOC office to ensure the student has registered and paid their tuition.
    - **Student Handbooks** – Give to students to use during class and to keep.
- Test and Evaluation Distribution: at the end of the day, 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. Filter the gradebook first by selecting the course with the relevant elective version, and then by the cohort group name. 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 to allow the student to take the test additional time(s).
- 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.
- 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. The recordings are on the Materials tab on the class units in the LMS.

- 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 II Course Management: Partner Files: 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

### 2001:

- **At least one week prior** to the 2001A class, Building Potential suggests you prepare an Excel workbook containing the following:
  - Sign-in sheets for each class (see instructions below)
  - Registration List (for your reference)
- **A few days to a week prior** to the 2001A 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/>), BOC Program Guide and LMS Getting Started guide located in the **BOC Repository: Level II Course Management: Partner Files: Forms**.
- **On the 2001A class day:**
  - Hand out first class materials including the Student Handbook, 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.
- Determine who has previously taken the BOC I course, and who has qualifying industry experience and/or education.

Share introductory information about the course, including:

- 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 your 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. This is typically taken by students after

completing the Level I course, but if students are starting with Level II, they can still apply to take the Certification Exam. 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 remind them they will always be notified if dates change. They can also access the syllabus on the LMS on the Level Two Introduction materials page.

Review the big picture of the course, stressing that each assignment builds on the next. They are ALL required for the final project. Stress the importance of getting them done on time. If they fall behind, catching up is difficult. Show a couple of final project videos from 2005 classes if possible.

Review the BOC Program Guide.

Review the following items:

- Student Handbooks: There is one for each class and students will keep them after the course series.
- 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:
  - Review the five assignments. It may be helpful for the instructors to work through some of the assignments in class together to help students.
  - Summarize the Project Scorecard.
  - 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
  - Confirm that all students have the building information required to complete the Level II Project Requirements, as outlined on the BOC website. Sample data is available for those who do not have building information.

### Supplemental Class:

- Review the Level II TCOC/Certification Application with the students, located in the LMS on the Level II Final 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 Level II Final Assignment page as their final project assignment or email it to the CM.
- Review the **Back on the Job** section of the Level II Final 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. Notify them that the form will be emailed back to them about one month after the course as a reminder. 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. If possible, this activity can take place in conjunction with the utility representative visit (and distribution of utility co-branded items, if applicable).
- Advise students that everyone who is eligible to receive the Level II TCOC (completed coursework, meets work/education experience requirements, paid tuition in full and completed the Level II TCOC application) will receive the TCOC which includes a letter and wallet card. 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.

- Remind students that they will be making short presentations to classmates and the instructor on a scoping report for their building during the 2005 class. Review presentation tools that students can use should they choose (PPT, Google Slides).
- Assign presentation slots and share those with students.

**2005 Class:**

- Prior to the final class (2005), share the presentation lineup with the 2005 instructor.
- Prior to the final class (2005), remind the students again via an email that they will be making short presentations to classmates and the instructor on a scoping report for their building. This email should address frequently asked questions related to the project presentations and include the student presentation lineup. CMs can also include BOC 2005 slide 6 as an attachment so students better understand the flow of the 2005 presentation day. Stress with students the different options for creating their presentations. There can be a lot of anxiety about presenting, so encouraging and supporting them is important. An email template is below:

Hi Everyone:

Looking forward to your presentations this week! The zoom codes for the class are below. Let us know if you have any questions - a few have been:

**Do we use slides?** Many find it helpful, but it's not required. You do not need to turn in your slides if you use them, you will just share it in class.

**If I have a slide show, how will that be shown?** We will turn on the Zoom setting allowing all participants to share their screen.

**I'm still working on the assignments...** It is fine to focus on the presentation, but try to get assignments AND the signed TCOC app turned in by DATE so I can get those in for processing.

**I am not going to have enough done to present this week....** Email me directly and we will work something out. You can pick up again with the next Level 2 course if you missed a lot of classes/tests. If it's just the assignments, you can keep working on it and we will schedule a presentation when you're ready.

**Zoom Information**

<https://zoom.us/join>

Class Dates	Class	Meeting ID	Password
3/30/2022	2005 part 1	Insert Meeting ID	Insert Password
3/31/2022	2005 part 2	Insert Meeting ID	Insert Password

Thanks,  
Your friendly course manager

- The CM should be ready and available to help share the presentations, if students don't have the bandwidth or ability to share. Some students may email the presentation to the CM prior to their time slot.
- Remind students that their project assignments, including the Level II 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.

- 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 information sheet and come to you during break or after the series ends if they have any questions.

### After the 2005 Class:

Complete the LMS Close-out Procedures:

Review TCOC/Certification Applications and check for completeness:

- 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 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 their certificate, the education portion of the application should be completed as well. Course Managers should make sure the student has documented sufficient 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.
  - Level II Eligibility: It is highly recommended that applicants for the training credential have a high school diploma or GED, and must have one of the following:
    - A technical degree and three years of experience working in operations and maintenance of a commercial or institutional facility, or
    - A union membership at journey level and three years of experience, or
    - BOC Level I Training Certificate of Completion or Certification and four years of experience.
  - 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 Curriculum Feedback Test Results Tracking form in the [BOC Repository: Level II Course Management: Partner Files: Forms](#) and email it to Melissa Sokolowsky and the BOC Help Desk

BOC-Level II-All Class-Procedures-and-Checklist-Partners-LMS 1.0

September 2024

Cecily McChalicher

## Contact Information

BOC Team	Job Title/ Role	Mailing Address	Email	Phone
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