APPLICATION TO BECOME A TRUSTED TRAINING/EDUCATION PROVIDER (TTEP)

FOR THE FEDERAL FINANCIAL MANAGEMENT WORKFORCE

Request for Information

GSA Chief Financial Officers Council
Application via the Version 1.0 Business Administration Skills Ecosystem (BASE)

Proposal Issued:	Proposal Due:
09/02/2021	**01/17/2022**

CFO
UNITED STATES
CHIEF FINANCIAL OFFICERS COUNCIL

Table of Contents

Context

Emerging technology is causing tremendous change within the federal workforce – making many current positions obsolete and creating new roles and processes. The roles created require new skills that are increasingly complex. To succeed, federal employees will need access to continuous learning tools and dynamic training content in a variety of modalities.

The CFO "Shape the Workforce" Working Group (the "WG") is tasked with managing the federal financial workforce modernization needs. To do so, it is currently developing an overarching 5-, 10-, and 20-year plan and is in the initial stages of designing and establishing a fed-wide centralized function that would provide workforce modernization direction, guidance, monitoring, and support.

As an extension of this broader workforce modernization effort, and in order to support the active lifelong learning that will be needed to succeed, the WG has recognized an urgent need for comprehensive employee career planning tools and a vast increase in access to training pathways for our employees. It is the CFO Council's commitment to put in place a Version 1.0 career planning/training solution. This application form/process is in direct support of realizing that commitment.

Note that this initiative is being taken on in close coordination with the White House Executive Office of the President (OMB) and in coordination with other Executive Councils. It is anticipated that if this effort is successful, it may be expanded to serve broader segments of the 2.1 million federal workforce.

Overview of the Version 1.0 CFO.gov Career Planning/Education Portal Solution

The WG is creating a webpage hosted on CFO.gov that will include **two** main features:

1. **FM career map and planning tool:** The first feature will be an easy to navigate, highly detailed, **career map** for federal Financial Management (FM) employees.
   - The career map (created by the WG) will address the specific knowledge, skills, and experiences needed by federal FM employees within each of the 54 competency areas (shown below in graphic 1) and 3 General Schedule (GS) brackets (junior, mid, and senior-level employees).
   - Employees will be able to reference this career map and planning tool for detailed and timely guidance in determining what competency capabilities they should have at their current level and those recommended for advancement.
   - In future iterations of the tool, they would also be able to access helpfully embedded tools, guidance documents, and templates.
   - Supervisors would also be able to use this tool to evaluate and identify the developmental needs of their employees.

Financial Management professionals generally perform work in one of these 54 competency areas

1. Accounting Analysis
2. Accounting Concepts, Policies and Principles
3. Advanced Financial Management
4. Audit Concepts, Policies and Principles
5. Audit Planning and Management
6. Audit Reporting
7. Budget Concepts, Policies and Principles
8. Budget Execution
9. Budget Formulation, Justification, and Presentation
10. Commercial Pay Concepts, Policies and Principles
11. Decision Support
12. Decision Support – Audit Execution
13. Financial Concepts, Policies and Principles
14. Financial Management Analysis
15. Financial Management and Reporting Analysis
16. Financial Management Systems
17. Financial Reporting
18. Financial Stewardship
19. Fundamentals and Operations of Accounting
20. Fundamentals and Operations of Budget

21. Fundamentals and Operations of Finance
22. Fundamentals and Operations of Military and Civilian Pay
23. Payroll Concepts, Policies and Principles
24. Accountability
25. Attention to Detail
26. Customer Service
27. Flexibility
28. Integrity/ Honesty
29. Interpersonal Skills
30. Oral Communications
31. Problem Solving
32. Public Service Motivation
33. Resilience
34. Written Communications
35. Conflict Management
36. Developing Others
37. Enterprise Perspective
38. Human Capital Management
39. Leveraging Diversity
40. Decision Making
41. Influencing/Negotiating
42. Mission and Culture
43. Organizational Awareness
44. Team Building
45. Continuous Learning
46. Technology Proficiency
47. Business Process Improvement
48. Project Management
49. Contract Management
50. Data Management
51. Robotic Process Automation
52. Critical Thinking and Creativity
53. Executive Communications & Decision Support
54. Virtual Engagement

***Graphic 1: 54 Competency** Areas*

2. **Numerous embedded links to external trusted training/education provider (TTEP) content:**

   As a second feature, integrated within the first (the career map), we will embed hundreds of web links to specific external courses, or other training/educational content, provided by a limited number of external TTEPs. The external training content, of many different formats or modalities, will address specific employee career competency knowledge needs at different stages of career progression (see Appendix 3 for more information). Types of content sought may include:

   » Graduate or undergraduate equivalent training content related to our 54 competency areas

   » Content relevant for the ongoing education of Certified Public Accountants (or equivalent)

   » Other content relevant to emerging knowledge/technology areas (e.g., Data Sciences, Analytics, RPA) or general federal employee skills/knowledge areas

How the two features will operate together:

3. Employees, while accessing the interactive web page career map (#1 above), would also find these embedded web links (to TTEP content, #2 above) fully interwoven, inserted where applicable, within the career map.
4. When employees looking for career guidance and training options click on the external TTEP links, employees would be taken off CFO.gov and onto the TTEP website where they would be able to

learn more about the TTEP-offered course/content (curriculum, scope, modality type, pre-requisites, price, etc.).

5. Employees would then be able to interact directly with the TTEP, on the TTEP site, to procure the course/content. Typically the procurement process would make use of the government purchasing card ("P-Card") – however, other modes of purchasing would be possible (e.g., bulk subscription, licenses).

How to become a TTEP:

This document describes the application process for those educational, consulting, or training providers (prospective TTEPs) that are interested in becoming one of the few trusted training providers with their courses/content embedded directly in the career map.

Which Organizations Should Consider Applying (to Provide Services as a TTEP in #2 Above)?

This application form/process is for those organizations (e.g., commercial, non-profit, university/college) with current training content that aligns well with the training and knowledge needs identified in our Version 1.0 career map tool (described in #1 above and outlined in Appendix 3).

This application/competition process is seeking up to five (5) potential TTEP partners for the 24-month period running through July 2023 that have:

- Current content: An existing training content catalogue covering a large, or critical, swath of our employees' knowledge needs
- Strong virtual capabilities: An ability to deliver services virtually (rather than solely in-person)
- Demonstrated scalability: Proven existing capacity to meet the needs of a large workforce
- Willingness to provide feedback that would improve our Version 1.0 solution

It is the intention of the WG that the five (5) TTEP spots would then be re-assessed every 2-3 years thereafter, beginning in July 2023.

How to Apply

Submit the following documents by January 17, 2022:

1. Application form (see Appendix 1)
2. Proposal (see Appendix 2 for requirements)
3. Curriculum map (see Appendix 3 for guidance) with links to content
4. Attestations (Appendix 4)
5. Indicate your organization's willingness to sign the Memorandum of Understanding (Appendix 6) if selected as a TTEP
6. Indicate your willingness for us to contact your references (Appendix 5)
7. Three (3) references (see Appendix 5 for guidance)

Application Evaluation Process

1. After applications are submitted by the prospective TTEPs, a review panel from the WG will be convened to consider all applications.
2. The review panel will evaluate the submitted applications individually and collectively according to the following evaluation factors.
   - Individual application evaluation factors
     - Reputation of the applicant for delivering quality training
     - Whether the training offered by the applicant aligns well with the FM community knowledge needs
     - An assessment of the effectiveness of the described training delivery model/ approach and the degree to which it is suitable for federal employees
     - The degree to which the relevant content is immediately scalable to meet the needs of the FM community
     - The extent to which the training delivery model is innovative
     - The willingness and capacity of the applicant to provide feedback that may inform future improvements on Version 1.0 solution (e.g., technical feedback, improvements to the competency model, identifying future curriculum needs)
     - The extent to which the applicant has a useful perspective on workforce modernization and continuous employee learning
   - Collective application evaluation factors (relative to all applications received). The goal of the selection process is to identify the best collection (mix) of TTEP providers:
     - That can most effectively cover the full range of knowledge needs,
     - Offer a range of effective delivery modalities, and
     - Offer comparative choice to our community.
3. The Review Panel will select no more than 10 applicants to present their approach during a 2-hour time window (less time may be needed). The presentation will include: an overview of the proposal, a demo of the training/delivery model, a discussion centered around user experience when navigating the TTEP's site to access content, and a question and answer period. After these sessions, the evaluation results will be finalized and the five (5), or fewer, finalists selected and on-boarded.

Why Apply to Become a TTEP?

Successful applicants could realize the following benefits:

- Actively promoted access to a 140,000 member workforce via the Career Planning Tool: As a TTEP you will be one of five, or fewer, organizations with the opportunity to embed links to your purchasable training content directly within the Version 1.0 Career Planning Tool. The Financial Management workforce is estimated to have approximately 140,000 employees – each with an approximate training budget of$1,000. In addition, leadership of the Financial Management functions of each of the CFO Act agencies will directly encourage usage of the Career Planning Tool and links to your course content if selected, and champion its value.
- Controlled and monitored access to the full CFO Council and Member Agencies: TTEPs will be able to periodically present their course offerings, curriculum, and recommended approaches to workforce modernization and continuous learning to the CFO Council and Member Agencies (schedules permitting) as well as have the capability to conduct direct periodic surveys in order to gather training feedback and identify future and current course content needs.
- Growth potential: If the Version 1.0 model is successful in meeting the needs of the 140,000 members of the Financial Management workforce, it is likely that participation rates will be high and the approach could also be expanded to include other functional areas across federal and state government (e.g., IT, Acquisitions, Operations, State Governments).
- Visibility & fed-wide halo effect: TTEPs, by participating in this key Executive Branch initiative, will gain unique perspectives on agency workforce modernization needs and, to the extent the TTEP is willing, become a trusted partner advising and contributing to workforce modernization and continuous learning topics in the government sector. Reputational success in this area may serve as an enabler in pursuing other opportunities across government or the private sector.

Appendices

Appendix 1: Application Information Content

(Include within your proposal submission – See Appendix 2)

Organization Information:	Entity name:	
	Physical address:	
	Website(s):	
Contact #1 Information	Name:	
	Email:	
	Phone:	
Contact #2 Information	Name:	
	Email:	
	Phone:	
If providing relevant training services under a currently existing contract or schedule, list here:	Contract/schedule (if applicable):	1)
		2)
		3)
		4)
		5)

Appendix 2: Application Proposal Guidance for Applicants

Please submit an electronic proposal document meeting the following requirements:

1. **Narrative proposal content requirements (provide content covering the following areas):**

- ***About your organization:***
  - General Overview
  - *Leadership*: Your organizational leadership and its structure
  - *Services scope*: The size and scope of your organization (particularly in regard to the training/educational services)
  - *Current student/learner population*: An overview of your current trainee/education student population (who they are, how they engage in training via your services)
  - *Current curriculum*: A description of your current training curriculum and, at a high level, indicating which content may be applicable to meet the needs of our Version 1.0 solution
  - *Training/education approach*: An overview of your training/education delivery model/modalities for providing training
  - *Ability to scale services to meet FM workforce needs*: A description for how your content may be rapidly scaled to meet the needs of our Financial Management workforce
  - *Quality assurance*: A description of the methodologies in place to ensure quality delivery of training/education content
  - *Reputational standing*: Describe any objective factors that provide an indicator of the success of your organization's approach to training (e.g., review ratings, links to articles, statistics, third-party rankings)
- ***Utility/access for the federal employee user***
  - *Projected/anticipated user experience in Version 1.0*: Please describe the user experience for our federal employees when they "click" on links to your external "a la carte" content:
    - How will they view information related to the scope of the individual course(s), the topics covered, the method(s) of education/training delivery,

the degree of interactivity.

- How they will pay for course content using the p-card direct purchase method (note you may also suggest additional purchase approaches such as subscription, bulk license, etc.)
- Outputs after completing the course (e.g., certificate, CPE credit, degree credit, degree)

- *Alternate approaches*: If you have a different delivery model/approach in mind for providing our employees with access you can describe it here (we are receptive to other approaches/options)

- ***Future iteration capabilities:***
  - Suggested approaches/strategies by which your organization might provide feedback (e.g., technical enhancements, competency model improvements, workforce modernization recommendations) to the WG in improving Version 1.0 and subsequent iterations of this solution
  - Describe your organization's ability to develop new content to meet the evolving needs of the Financial Management employee workforce
  - Describe your organization's ability to meet the needs of other workforce groups such as IT professionals, HR professionals, and general federal employees. Note this question anticipates that Version 1.0 is successful and could be potentially expanded to also cover other areas of federal service (beyond just Financial Management functions)

- ***Include the populated Appendix 1 Form (not part of page count)***

2. Formatting requirements:

- Document type: Submitted as an MS Word Document (not as PDF)
- Length: No more than 20 pages
- Type sizing: No less than .5-inch margins and size 11 font
- Excluded: Table of contents, opening letter, demo screen shots, and title page not included in page count
- Send to cfoc.support@gsa.gov
- Subject of email should include "CPTT BASE Application - Organization Name"

Appendix 3: Instructions for How to Complete the Mapping Matrix (See Appendix 3 Attachment)

Introductory Context:

The CFO Council has taken up the ambitious and challenging task of modernizing its 140,000 member workforce. A number of initiatives are underway that we hope will serve as a broad initial foundation for that modernization effort.

The intent behind this specific initiative, as outlined in the RFI, is to begin work on a central website-based hub that will provide career development information for our federal Financial Management employees. Later iterations might conceivably expand beyond the Financial Management Community. In version 1 (the beta version), we'd like the hub to initially provide both a basic interactive career map (created by the CFO Council) and, interwoven/embedded within and closely aligned with the 54 career development competencies, links to purchasable external training/knowledge content (e.g., provided by you – the training/content providers, tech companies, online universities/colleges, etc.).

The initial Version 1 (beta) career map is built around four job roles, 54 competencies (with five performance levels) and entry (GS7-9), mid (GS 10-13), and senior (GS 14-15) levels of career development.

The intent of the mapping matrix is for us, the CFOC Workforce Working Group, to understand how your curriculum/training/knowledge offerings align/fit/complement the CFOC career map guidance. The matrix (specifically columns B & C within) is a simplified version of the career map that lists the 54 competencies and 5 performance levels.

Training providers should analyze their own curriculum/training/course offerings and indicate, via the mapping matrix (columns D through AB), which best cover/apply to the career map's 54 competencies and 5 performance levels.

How to Complete the Mapping Matrix

1. ***Be Familiar with the Competencies and Performance Levels***
   a. Using the mapping matrix (adjacent worksheet), first – review and understand the CFOC career map's 54 Competencies (column B) and the related Performance Levels (column C). These competencies and performance levels form the core of the CFOC Career Map. It is important that you understand our CFOC workforce competencies and levels before identifying which of your courses / content best align to them.

2. ***Preparation:***
    a. Using your organization's own list of courses/content offerings, identify which most closely apply to the CFOC Career Map competencies (column B) and performance levels (column C)
3. ***Input***: For each applicable individual course/content offering you have, populate the mapping matrix
    a. Course Name (column D): Where applicable, for each competency, enter course name / title.
    b. Course Description (column E): Provide an individual course/content description.
    c. Indicate Applicable Performance Levels (columns F-J): Indicate which performance levels apply to the course being inputted (recommend using "X" or "Y").
        i. Note - The five performance levels are intended to indicate the employee progression steps for mastering a given competency ("Awareness" - incrementally up to "Expert").
            1. As an example – an Accounting 101 course might address the competency "Accounting Analysis) (row 5, column B) and performance levels 1 and 2.
            2. Whereas an Accounting 201 course might address the same competency, but be more applicable to level 3.
        ii. You may manually insert as many rows as needed within a given competency.
    d. Justification (column K): In this column, please specifically describe how your given course aligns with the specific CFOC competency and selected level(s).
        i. Stated differently, describe how your course helps an employee develop knowledge about a competency and set them up to perform well for a given performance level(s).
    e. Populate the pricing columns (L-M):
        i. Pricing is a factor for the CFOC in the overall training/content provider selection process, however, the *principal consideration* is to obtain quality innovative training/content.
        ii. For the "Favorable Pricing" column we are looking for an indicator as to whether you will be able to extend favorable pricing terms to the government. Favorable pricing terms are not a requirement, however, if favorable pricing is extended, it will make it easier for us to market your courses to our core federal audience.
        iii. We envision most of our employees purchasing your content directly using individual purchasing cards – i.e., an individual transaction. However, we do

anticipate that some training providers may have other payment models to put forward (e.g., subscription, package, etc.). Please feel free to describe these alternative payment options, if available, in the "Additional Information" column AB.

f. Populate Time Commitment fields (N-O). We understand that courses come in all different modalities/delivery models. Some courses can be completed in one "sitting", while others, may be completed over a set period of time (e.g., months, quarters) as distinct classes or phases.

g. Indicate the learning modality type (i.e., how the course will be administered?) in columns P-T

h. Takeaway (columns U – Z): If applicable, indicate the "takeaway" the user receives from completing the course. As an example, the user may receive course credit, CPE, etc.

i. Provide a course hyperlink in column AA:

    i. If available, a link to course/content, similar to what employees would experience.

    ii. It is not necessary to provide a link, however, it would be an indicator to the evaluation team that the vendor/organization's training content is ready to be scaled up and applied within the Career Planning tool.

    iii. In the final version 1 rollout, we envision that links to your content will provide the federal user with access to some variant of the following information (this will help inform their purchasing decision): Individual Course Name and Description, Pricing Information, Learning Modality, Course Duration, Course Takeaway (e.g., Degree, certificate, badge), Access to independent user reviews (Optional), How to purchase and access the content

j. Additional Information (column AB):

    i. Please feel free to add in any additional clarifying information.

    ii. You may also use this field to add in any information that would add value to your application that doesn't easily fit within the other data fields.

Notes

» The competencies and performance Levels are part of a Version 1(beta) Career Map for the Financial Management Workforce. We do expect this to mature, evolve, and expand. That change process will be one that is conducted in close coordination with the selected training/content providers.

» We have tried to simplify the mapping process/matrix as much as possible, however, we are open to suggestions on how the process might be further simplified. Any suggestions should be included among the questions submitted via the survey tool.

Appendix 4: Attestations

If selected as a Trusted Training/Education Provider, __________________ is authorized to execute a Memorandum of Understanding (MOU) as provided in Appendix 6.

If selected as part of the final round of 10 interview panel organizations, ___________ consents to the WG contacting listed references to verify performance.

Signed by:

Title:

Signature: __________________________

Date:

Appendix 5: References

Please attach to your proposal 3 external references. The references should be for organizations, or groups, external to the Applicant, that can most support the Applicant's application assertions as to training/education services, delivery model, quality of services, customer service, etc.

The references should each be no longer than one page and include the following information:

- Name of the organization or group
- Contact name, title, email, and phone number
- A description of the services that the applicant provided to the organization (or group) and how they are comparable and/or aligned with the types of training contemplated within the Version 1.0 model
- A description of how long these services have been provided
- A description quantifying the scope of services provided (e.g., number of students/ learners, number of courses, how long)

Appendix 6: Memorandum of Understanding

This Memorandum of Understanding (MOU) is intended to codify what the WG and CFO Council intend to be a cooperative joint endeavor with the TTEP.

Through this MOU agreement, the CFO Council and the "Shape the Workforce" Working Group ("The Government") intend to establish a Central Career Planning Portal with links to the TTEP's course content (as described within the application document). The CFOC believes that this endeavor is in the joint interest of both parties in order to create rich ecosystem of information and course options that best meet the needs of federal employees and provide fair compensation to TTEPs. To the extent that this approach is successful, it is expected that a large percentage of the federal Financial Management workforce will be directed to the TTEP site in order to procure course content.

- The Government intends to:
  - Establish a web page and career planning tool with TTEP content links embedded in the very near future (i.e., likely the next 1-2 months) – referred to as the "Version 1.0 solution" or "V1" – and be responsive to feedback on improving V1 (and subsequent iterations)
  - The Government will do its best, given time/access constraints, to make the CFO Council, and member agencies, available to the TTEP, in order to:
    - Present overviews of curriculum content or best practices/new technologies related to continuous learning or workforce modernization
    - Present enhancements to the curriculum or overviews of significant new, and relevant, content offerings
    - Survey the Council, member agencies, and, to the extent feasible, federal employees in order to determine their current and future course content needs
  - Make WG support staff available to discuss any issues encountered in supporting this effort
  - Give the TTEP at least 1 month's advance notice if the site will be inactivated, or vendor links will be removed from the site
  - Provide the TTEP with a contact list of current contacts to assist with resolving any issues and improving the delivery model

» The TTEP agrees to make reasonable efforts to support this endeavor by:

- Providing information and web links connecting in to the V1 tool
- Promptly notifying the WG team if courses are substantially changed or web links are revised
- Providing a semi-annual list of federal participants that have registered for courses with TTEP web links on the V1 site (the Government may conduct post-course completion surveys)
- Providing independent ratings of courses (i.e., Yelp-style reviews for courses)
- Providing a best-price guarantee (this will allow the WG to better market the portal to the federal community and help gain traction; note: if the vendor wishes to provide a stronger guarantee, the CFOC will post it) and an annual attestation supporting this assertion (note that the strength of this assertion will influence how strongly the CFOC/WG can advertise the TTEP's offerings)
- Providing feedback and suggestions on how to improve the V1 tool (or subsequent iterations) and, to the extent feasible, inputs on how the career map tool/content might be further improved (note that the Government is also very receptive to broader feedback on the topic of workforce modernization and continuous learning and may, from time to time, ask the TTEP if they have any feedback or insights to share).
- Providing the Government with a contact list of current contacts to assist with resolving any issues and improving the delivery model
- Coordinating all communications to the CFOC or member agencies, related to this joint venture, for approval via the WG prior to sending

As this is a cooperative endeavor, either party may withdraw from the agreement at any time (due to performance concerns or otherwise). The Government, for its part, will try to give at least several months advance notice of any change.

Both parties sign this agreement with an understanding that it is a reflection of intended, mutually beneficial action, and is non-binding:

TTEP Representative	Name:	Title:
	Signature:	Date:
Government Representative	Name:	Title:
	Signature:	Date: