A Scalable Initiative to Accelerate Upskilling & Modernization for the 140K Financial Management Workforce

The CFOC Career Planning & Training Tool

Office of Federal Financial Management
OFFICE OF MANAGEMENT AND BUDGET

CFO
UNITED STATES
CHIEF FINANCIAL
OFFICERS COUNCIL

This initiative creates a centralized hub for _Workforce Modernization._ Key Attributes Include:

- ✓ A **Career Guidance Portal** for FM Job Series, GS Levels, and 54 Career Competencies – a core part of our 140,000 FM Workforce,

- ✓ Access to best-in-class Private Sector **career modernization training**,

- ✓ A **competitive marketplace** for content – that leverages $140M training purchasing power,

- ✓ Fits within an innovative and **lightweight legal structure** that frees us from restrictive procurement bureaucracy,

- ✓ Serves as a **buildable core** that can be used as a basis for building out a centralized modernization function (QSMO-like) across government,

- ✓ Has **inherent flexibility** to build-in future services/capabilities (e.g., portable credentials/badging),

- ✓ **Can be easily expanded** to cover other segments of the Federal workforce (it would beneficially increase purchasing power leverage),

NOTE
- ✓ It's also relatively very cheap to establish
- ✓ The unique legal structure opens up many possibilities that make it easier to partner with vendors and much more agile to operate and maintain

Context

Future State

Today (Agencies Acting Independently)

From the Financial Management Community's perspective, with an estimated 140K workforce, current workforce modernization efforts at the fed-wide level appear uncoordinated

- Agencies, to varying degrees, are tackling this on their own

- Most only have basic approaches (annual reviews, goal-setting, evaluations, training budgets)

The CFO Council is implementing several initiatives to address workforce modernization using approaches and initiatives that, if successful, could be scaled up and used across the government for other segments of the workforce:

- A 10-year workforce modernization strategy

- Centralized recruiting pilots

- Upskilling cohorts

- The **Workforce Modernization Career Planning and Training Tool** (described in this document)

Idea Genesis & Initial Scope

"We're going to need a bigger paradigm"

The initial concept for building a Career Planning and Training Tool began several months ago with an OFFM request to "get *industry* to compete to provide us innovative and robust training content" and to put in place a training solution that would serve the needs of our 140k Financial Management Workforce

In addition to the ask, were several core guiding principals:

- ❑ No initial or ongoing centralized funding (i.e., easy to maintain)

- ❑ Pay-as-you-go model (we establish market, users pay for services)

- ❑ Have vendors innovate over challenges (i.e., make it attractive; don't scare away)

- ❑ Build a foundation that has enough traction/critical mass that we can iterate on

- ❑ Initial content should be at a knowledge-level similar to MBA/CPA/Undergrad content

- ❑ Also addressing other knowledge area needs

- ❑ Limit it to a small number of vendors with max content coverage to drive competition

- ❑ Must have a turn-key solution (able to scale immediately)

The solution/approach that evolved, satisfies all of these core initial requirements – and is described on the following pages

- **As mentioned on the previous slide, the initial request was to "put in place a training solution that would serve the needs of our 140k Financial Management Workforce"**

- **Identifying the training needs cannot be done in a vacuum**
  - The training needs to be tailored to the needs of your workforce – that is, the knowledge and skills the workforce needs – at different GS Levels and within different job specialties
  - This type of information is typically captured in the form of a career map
  - A career map provides individual employees with guidance on the skills and knowledge needed at every GS-level and for various career paths
  - Fortunately, the CFOC already has an initial career map that was developed with close support from OPM

- **We used the current *CFOC career map* as a starting point, to identify the types of training needed by our workforce**
  - In addition, we expanded it to include needed future skills and competencies
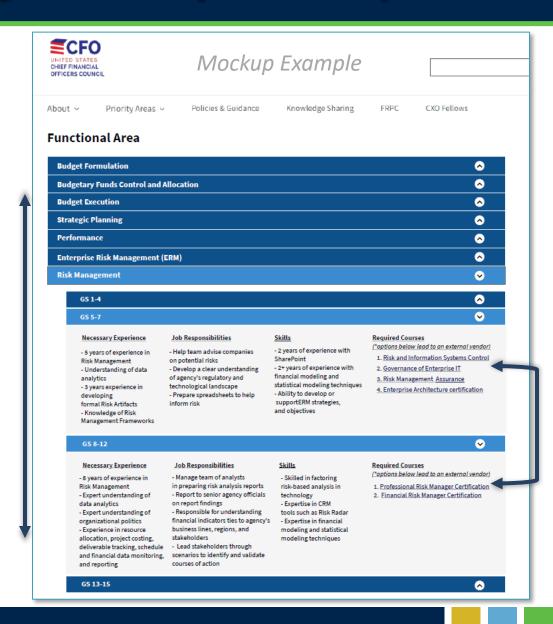
Version 1.0 Design – Keep it Simple

- The initial design for the Career Planning Tool will be simply constructed and used to prove the concept

- User Story Description

  - In navigating a career map by function area and GS-level, employees will quickly identify the skills, knowledge, experiences, and training they need to remain current and to advance (mockup shown right)

    – Via the Navigable Career Map (Left Side of Adjacent Graphic)

  - They will also be able to click on links to trusted / vetted vendors with innovative training content that satisfies their knowledge needs

    – Via embedded links as shown (right side of adjacent graphic)

    – Connecting to a vendor takes them off the cfo.gov page and directly to the vendor site where they can access course content and pricing information

    – The process to pay for content would take place between their agency and the vendor (bypassing cfo.gov/GSA) as a normal p-card transaction following whatever local agency policies are applicable
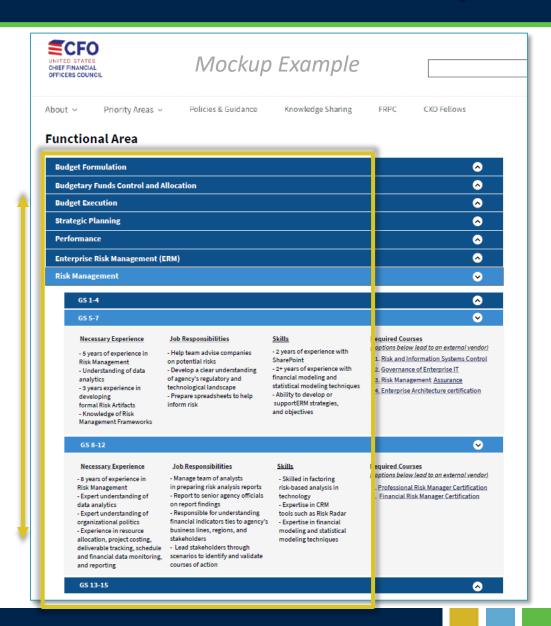

Mockup Example

Version 1.0 – Interactive Career Map

- **In order to quickly create the version 1.0 career map information we will need to be collectively agile**

  - The goal is to get it 80% right at launch and iterate from there

  - We would use current competency information as a starting point

  - We will expeditiously reach out to agencies for any additional inputs

  - We will leverage the vendors as well for their expertise

- We anticipate that the career map / competency models would be updated annually, and we hope to leverage the vendors to assist with this process (providing feedback – if allowable)
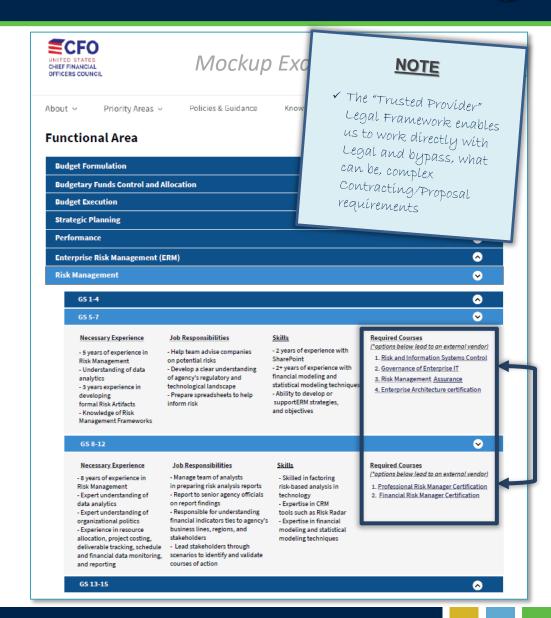
- We will have training providers compete for the opportunity to be one of a very small number of trusted training providers
    - Our hope is that we'll also be able to negotiate a best price guarantee
    - We will use a "Trusted Provider" legal framework that greatly simplifies the legal and contracting framework
    - Using this approach, we can be streamlined and agile in our vendor relationship

- In order to be accepted, vendors must:
    - Have currently existing content (e.g., MBA/CPA-level, Data Analytics, etc.) that aligns with our training needs
    - Have proven and innovative delivery models
    - Be willing to operate in a pay/go model
    - Possibly provide feedback to us that helps us maintain our competency models

- As a Council we will also allow them access to us, our agencies, and our employees to determine training needs (e.g., surveys, presentations)

NOTE

✓ The "Trusted Provider" Legal Framework enables us to work directly with Legal and bypass, what can be, complex Contracting/Proposal requirements

Strategy: Attracting the Right Vendors

FEDS
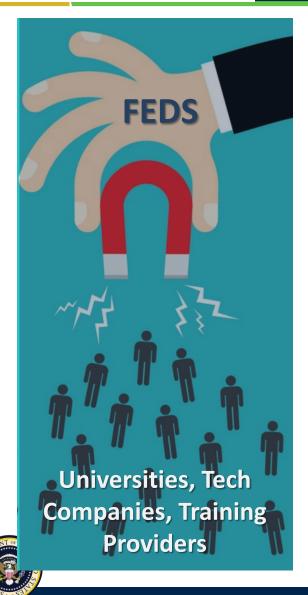
Universities, Tech Companies, Training Providers

- By creating an artificial **direct, and promoted, training access pathway to our 140K employees**, we hope to attract top training vendors to compete for placement within our career planner (limited to 5-7 vendors) – creating an artificial competitive market using inherent incentives

- Main potential **vendor benefits** include:
  - Potential access to approximately $140M training budget spend (or more)
  - Growth potential to other functional areas
  - Opportunity to experiment, team, and learn from the effort at scale
  - Access to agency / exec branch leadership

- Use Trusted Provider List approach (Similar FIPS APL)
  - Agile to maintain (Legal, Us, Vendors)
  - Includes non-binding MOU
  - Standard RFQ/BPA/contract approach would be unwieldy

NOTE
- ✓ The 140K estimate is based on the full range of functions and job series that fall under the CFO shop.
- ✓ For Version 1.0 we'll likely only have a fraction of that

Strategy: Attracting the Right Vendors

FEDS

Universities, Tech Companies, Training Providers

- **Our goal is to attract top education/training providers**

- Ideal *outside –the-beltway* providers will likely not be familiar with the government space (e.g., universities, tech companies) and have a hesitancy to engage, or **biases that we need to overcome**

- For that reason, we're trying to **design every aspect of our approach to overcome hesitation/biases**
  - Using a 1-page non-binding MOU (low risk, easy for their lawyers to consider)
  - Plain language RFI with brochure-like materials (overcome the bias that government is over-regulated)
  - Emphasizing collaboration, iteration, and teaming and what we see as the potential business opportunity
  - Direct outreach with polished brochure materials, calls, and meetings
  - Securing news coverage
  - Press release

- **We need a virtuous cycle effect for this model to succeed**
  - At launch we must have enough success that it encourages continued support and investment from all groups
  - As the groups (users, vendors, executives) see value in the tool they will channel more resources, support, and attention into it

- We will either need to have "enough" content/users soon **after launch or the time, space, and patience to build towards it**

Virtuous Cycle
Enhancements in one area encourage enhancements in other areas

- Approach Appeals to Perspective Vendors Resulting in Greater Engagement
- Good Career Guidance Content Attracts Users to Site
- Good Business Education Content Attracts Users to Site
- Strong Awareness & Interest by Fed Employees Results in Profits for Vendors
- Strong Executive Championing by Agency and OMB Leadership Drives Users to Site
- Expansion of Tool Features & Scope by WG Team Drives Users to Site
- Vendors see Increasing Opportunity, User Traffic & Profit in Improve their Offerings

Timeline

Provider Coord...	**Attract Training Providers** • RFI and Online Repository of Information • Direct Reach-outs with Brochures and 1-on-1 Meetings • Articles & Press Releases	**Evaluate Applicants** • Individual • Collective • Demos	**Populate Website** • Links • Test & Coord...	**Maintain Course Content & Collaborate w/ Vendors** • Updates to reflect changing vendor offerings • Gather feedback to improve Version 1.0 • Provide access to the Council/Agencies		**Re-compete**
CFOC Coord...	**Get Commitment & Maintain Support from CFOC** • Briefings and Information Packages for CFOC • Get Updated Buy-in • Identify Leads to Coordinate With	• Stay in Touch • Other?		**Expand Support, Keep Informed, Gather Improvement Feedback** • Keep CFOC Community Engaged (TBD) • Update CFOC on Performance Stats • Gather feedback to Improve Version 1.0		
User Outreach		**Awareness Campaign with Fed Users** • TBD – Seeking Ideas		**Gather User Experience Feedback and Improve Offering** • Vendor Yelp Ratings • Direct Surveys to Users		
Design	**Design Work to Prep Webpage** • Get funding to REI • Approve Mockups	• Conduct Build • Upload Web Links		**Iterate & Enhance FEDS (V2+)** • Merge in DoD Model • Expand Career Map	• Add Other Services • Iteratively Improve	**Re-compete**
	June	July	August	Sept	October	November +	24 Mth Later (Post Launch)

- **Version 2.0+**
  - **Expand to include new / refined DoD competencies and additional Job Series**
    - DoD is 45% of the market – critical to success
    - Planned for in Version 2.0
  - **Greatly enhance the career map**
  - **Add in other services** (noncompetitive with vendors) - Examples
    - Detail opportunities, key job openings
    - Highlight working groups or initiatives seeking members
    - Mentoring/coaching network
    - Advertising working groups seeking membership

- **Other Future Considerations**
  - Establishes policy that connects career map as a prerequisite for evaluations , annual goal-setting and advancement
  - Establish a mechanism to manage skills / knowledge inventory and planning across the FM space
  - Create / launch a QSMO-like function that can manage career workforce modernization across the FM spectrum

NOTE
- ✓ We have new funding that can be applied
- ✓ Plan is to prove the concept with Version 1.0 then expand / make it more robust in Version 2.0

Understanding the Risks to Success

RISKS	MITIGATION	
Quality Vendors Don't Respond	• Prior RFI / Will reach out to respondents • Press Release • Direct Reach-outs	• Posting RFI on Fedbizopps • Articles • Brochures
CFOs Don't Really Drive Traction	• Briefing/polling them on 2/16 • Strong messaging and reinforcement from OMB, Treasury, and the WG • Regular interactions and updates • Trumpet successes and value	• Giving them clear actions to drive traffic • Future policy linking FEDS to evals, annual goals, and advancement
CFOs don't provide resources to assist with updating Career Map, engaging with vendors, or providing feedback	• Strong messaging and reinforcement from OMB, Treasury, and the WG	• Regular interactions and updates
Fed employees aren't aware or don't engage	• Top Down reach-outs through CFOC agency leadership	
Resource requirements are more than anticipated	• Assume the risk	
QSMO Treasury May Not Absorb	• Assume the risk	• Stand up alternative QSMO
This is a NEW untried approach / unknowns	• Assume the risk	• Responsive team members