

# BPA Human Resources Desk Reference

## Employee Development and Training

HR Desk Reference: 410-04-01

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## 1. Purpose & Background

This HR Desk Reference implements the DOE Order 360.1D – Federal Employee Training at BPA.

### A. Introduction

1. **HR Governance Model:** This HR Desk Reference is part of a tiered approach to BPA’s Human Resources governance model. The first tier is the BPA Human Resources (HR) Policy, which provides broad BPA-wide guidelines and standards for making specific human resources-related decisions and specifies who in BPA is delegated the authority to make them.

The second tier consists of HR Desk References covering more detailed instructions concerning program administration and processes. These second-tier documents will be authorized in the related HR Desk References section of the BPA HR Directive when they are published as an extension of a specific HR directive.

The third tier consists of Standard Operating Procedures applicable to a specific business process. Standard Operating Procedures may stand alone or be encompassed in an HR Desk Reference. Note that SOPs are internal group documents and do not impact working conditions or negotiated BPA HR Directives or HR Desk Reference guides.

2. **Design of the HR Desk Reference:** In order to support the overarching guidance contained in the relevant HR Policy, this HR Desk Reference provides a standardized and consistent approach to HR and BPA Management’s administration of the programs and processes contained in this HR Desk Reference.
3. **Using the HR Desk Reference:** Recorded information is an integral part of all business functions at BPA and as such, is an asset of the agency that is handled and managed based upon content and the circumstances surrounding the function. Users of this HR Desk Reference are likely to reference a specific function or procedure rather than reading it in its entirety and it is therefore structured to reflect this type of use.

- B. BPA-HRSC publishes this HR Desk Reference to ensure that BPA maintains a compliant and structured program supporting its strategic objectives through standardized, consistent processes. BPA must demonstrate that authorized expenditures are defensible. Additionally, BPA must be capable of reconstructing actions as needed for proper program management, evaluation, and audit purposes.
- C. The HR Desk Reference aligns with the intent to provide training opportunities across the workforce, including federal and student employees, in accordance with merit system principles. It is specifically crafted to aid managers, supervisors, and human

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resources professionals in administering employee training and development accurately and efficiently.

## 2. Applicability

BPA funds both technical and non-technical training. BPA pays only for training and development activities that support BPA's mission and business objectives. Training must improve an employee's ability to perform his or her job, enable an employee's ability to perform needed or potentially needed duties outside the current position description, or meet other organizational needs as identified in the Talent Management Strategy. Training and development can also be provided to address an individual's skills obsolescence in the current position and/or training and development to prepare an individual for a different occupation, in the same agency, in another Government agency, or in the private sector.

BPA will not pay fees for professional certifications or licensure unless specified by collective bargaining agreement or authorized via a separate published BPA HR Directive or federal statute. BPA may provide services, training, or retraining to assist displaced and surplus employees under BPA's Career Transition Assistance Plan (CTAP). In keeping with BPA's core mission value on trustworthy stewardship, managers and employees should therefore commit to attend any registered training event providing they registered themselves for the training.

## 3. Terms & Definitions

- A. **BPA Approved Certification/License List:** The list of certifications and licenses approved for cost reimbursement.
- B. **Certification:** A certification shows an individual has demonstrated a pre-determined level of knowledge and skill to perform in his or her profession, occupation, or role. Certification is awarded by a third-party, standard-setting organization.
- C. **Competency:** A competency is a measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully. Competencies specify the "how" of performing job tasks, or what the person needs to do the job successfully. Competencies are used for:
  - 1. Assessing and selecting candidates for a job.
  - 2. Assessing and managing employee performance.
  - 3. Workforce planning; and
  - 4. Employee training and development.
- D. **Continued Service Agreement (CSA):** An agreement an employee makes to continue to work for DOE for a pre-established length of time in exchange for BPA-sponsored training or education. The service obligation begins when the training is completed. If

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the employee voluntarily leaves DOE service before completing the service obligation, he or she must repay BPA all or some of the costs of the training (excluding salary).

- E. **Credentials:** A designation normally provided by State or publicly recognized organizations and can include credentials such as professional accreditations, licenses, or certifications that either is directly related to the employee’s current position or that are considered to further DOE interest.
- F. **External Training:** Training provided by an outside vendor that requires enrollment through that vendor. Learning Management System (LMS) entry is for tracking purposes only.
- G. **Internal Training:** Training purchased by the Learning and Workforce Development (HT) organization or a BPA internal business unit. Internal business units can only purchase training directly with an approval from the Micro-Purchase Program and Compliance and Governance offices. An instructor facilitates the training in person or virtually.
- H. **Management Officials:** Defined in 5 U.S.C. 7103(a)(11), employees whose work requires or authorizes them to formulate, determine, or influence the policies.
- I. **Mandatory Training:** Training the supervisor or manager requires the employee to complete because the knowledge, skills, or competencies gained are necessary for the employee to successfully perform the job (different from required training).
- J. **“No Show”:** An attendee is considered a “No Show” for a course when cancellation processes are not followed prior to a class, there was not a warranted emergency to excuse the absence, or if the employee fails to sign the roster or other method of attendance verification. The trainer will remind the employees at the end of the course.
- K. **Non-technical Training** addresses:
  - 1. Interpersonal skills needed to provide services, work with, and/or manage others;
  - 2. Behaviors expected of employees in the workplace; or
  - 3. Workplace health, safety, security, or other organizational performance issues.
- L. **Performance Planning and Review Document(s):** A written plan identifying competency gaps and training or development activities needed to close those gaps. Employees and managers jointly develop these documents.
- M. **Required Training:** Training BPA and/or DOE requires for all employees or for a specific group or groups.
- N. **Talent Management Strategy:** A long-range strategic plan to ensure BPA’s workforce talent can continue to deliver on its mission while meeting challenges posed by a dynamic energy industry, changing stakeholder needs, and emerging technologies.
- O. **Tier II Organization:** An organization designated by a two-letter code, such as NS or NT.

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- P. **Trainee:** The person attending a training class, or an employee in a formal training program (e.g. Substation Operator Trainee, Dispatcher Trainee).
- Q. **Training:** A planned, prepared, and coordinated program, course, curriculum, subject, system, or routine of instruction or education, which will improve individual and organizational performance and assist in achieving the agency's mission and performance goals.
- R. **Technical Training:** Provides the knowledge, skills, and competencies required to perform assigned duties and responsibilities.

#### Acronyms

|              |                                                          |
|--------------|----------------------------------------------------------|
| <b>ADTP</b>  | Academic Degree Training Program                         |
| <b>ATP</b>   | Annual Training Plan                                     |
| <b>ATS</b>   | Annual Training Summary                                  |
| <b>BPI</b>   | Bonneville Purchasing Instructions                       |
| <b>CFR</b>   | Code of Federal Regulations                              |
| <b>COO</b>   | Chief Operating Officer                                  |
| <b>COR</b>   | Contracting Officer Representative                       |
| <b>CPTC</b>  | Columbia Power Trades Council collective bargaining unit |
| <b>CSA</b>   | Continued Service Agreement                              |
| <b>DOE</b>   | U. S. Department of Energy                               |
| <b>EDP</b>   | Executive Development Plan                               |
| <b>eOPF</b>  | Electronic Official Personnel Folder                     |
| <b>F</b>     | Finance                                                  |
| <b>FTOA</b>  | Accounts Payable & Receivable                            |
| <b>GWA</b>   | General Wage Adjustment                                  |
| <b>HA</b>    | Recruitment & Placement Office                           |
| <b>HE</b>    | Employee and Labor Relations                             |
| <b>HI</b>    | HR Advisory Group                                        |
| <b>HR</b>    | Human Resources                                          |
| <b>HRD</b>   | Human Resources Director                                 |
| <b>HRMIS</b> | Human Resources Management Information System            |
| <b>HRSC</b>  | Human Resources Service Center                           |
| <b>HT</b>    | Workforce and Leadership Development                     |
| <b>IDP</b>   | Individual Development Plan                              |
| <b>IGLM</b>  | Information Governance and Lifecycle Management          |
| <b>ISD</b>   | Instructional System Designer                            |
| <b>LDAC</b>  | Learning and Development Advisory Council                |
| <b>LMS</b>   | Learning Management System                               |
| <b>MCO</b>   | Mission Critical Occupations                             |
| <b>NERC</b>  | North American Electric Reliability Corporation          |

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|             |                                          |
|-------------|------------------------------------------|
| <b>OWCP</b> | Office of Worker's Compensation Programs |
| <b>PA</b>   | Partnership Agreement                    |
| <b>POC</b>  | Point of Contact                         |
| <b>SES</b>  | Senior Executive Service                 |
| <b>SME</b>  | Subject Matter Expert                    |
| <b>SSG</b>  | Self-Study Guide                         |
| <b>TAP</b>  | Tuition Assistance Program               |
| <b>TNA</b>  | Training Needs Assessment                |
| <b>VTPR</b> | Vendor Training Purchase Request         |
| <b>WSC</b>  | Workforce Strategy Committee             |

#### 4. Responsibilities

##### A. Accounts Payable & Receivable

1. Reimburse allowable costs.
2. Process collection for any CSA and other training obligations unmet.

##### B. Chief Operating Officer and Senior Vice Presidents (Power and Transmission)

1. Assign coordinators to develop Academic Degree Program Plans.
2. Manage and fund the Academic Degree Training Program (ADTP) for their organizations.

##### C. Contract Personnel

1. Complete assigned required training.
2. Request enrollment in training through the Supplemental Labor process.
3. Cancel training in the Learning Management System (LMS) or notify Learning and Workforce Development if unable to attend at least five days before a session begins.
4. Attend approved training and participate in course activities.
5. Complete the training costs documentation as directed by Supplemental Labor.
6. Ensure training records accurately reflect course completions. Contact [hrtraining@bpa.gov](mailto:hrtraining@bpa.gov) if training record information is missing or incorrect.

##### D. Federal Employees

1. Complete assigned required training.
2. Work with their supervisor to define career goals and identify areas for improvement, interests, goals, and organizational requirements. Use this information to find development opportunities.
3. Request enrollment in training through the LMS or External Training Request.

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4. Cancel training in the LMS or notify Learning and Workforce Development if unable to attend at least five days before a session begins.
5. Attend approved training and participate in course activities.
6. Complete the training costs entry for external training in the LMS.
7. Ensure training records accurately reflect course completions. Contact [hrtraining@bpa.gov](mailto:hrtraining@bpa.gov) if training record information is missing or incorrect.
8. Sign and comply with the terms of a Continued Service Agreement (CSA).
9. Apply for selection into the ADTP. Submit completed Academic Degree Plan for approval.
10. Maintain academic, performance, and conduct standards.
11. Submit bills, invoices, transcripts, proof of payment, and BPA Form 2230.06e for reimbursement when using the ADTP or Tuition Assistance Program (TAP).

**E. Finance**

Approve changes to the approved certification list and arrange reimbursement based on claims.

**F. HR Advisory Office**

1. Support executives in completing Executive Development Plan (EDP) requirements.
2. Collect and report data for BPA's compliance with EDPs.

**G. Employee and Labor Relations**

1. Consult with managers suspending or terminating academic degree training program participation.
2. Responsible for the interpretation and application of hourly apprentice and substation operator trainee CSA sections.

**H. Recruitment & Placement Office**

1. Process and administer CSAs for the Electrical Apprenticeship and Substation Operator Trainee programs.
2. Create and process training interest and vacancy announcements to competitively select eligible employees for participation.

**I. Workforce and Leadership Development**

1. Initiate and allocate resources to complete an annual training needs assessment.
2. Collect and report data for BPA's compliance with Individual Development Plans (IDPs).

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3. Incorporate competency gaps identified in the Learning Management System (LMS) into planning for the annual training plan.
4. Register and enroll executives into 360 assessments when requested.
5. Schedule activities to meet required training goals.
6. Coordinate between responsible organizations and training activities.
7. Complete an annual required training program plan.
8. Develop partnership agreements with responsible organizations.
9. Maintain the required training list.
10. Coordinate the creation of a self-study guide (SSG) for contractors without network access.
11. Conduct after action reviews to improve training effectiveness and student experience.
12. Receive eLearning training content and coordinate development in the Learning Management System as requested to provide for BPA personnel.
13. Maintain existing BPA created eLearning courses, work with Subject Matter Experts on approved projects to create eLearning solutions and support other developers at BPA to help them implement their eLearning goals.
14. Coordinate communications with POCs and the Required Training Program Manager.
15. Distribute communications.
16. Administer training records.
17. Support inclusion of courses and training record maintenance in the LMS.
18. Provide required training proposals to the Workforce Strategy Committee.
19. Support enrollment and waitlist management in the LMS.
20. Catalog training events received by external training request.
21. Register individuals for approved training events.
22. Enter completed rosters into the LMS.
23. Process and administer CSAs for training events.
24. Review and submit changes to the approved certification list.
25. Review, approve, and monitor Academic Degree Plans.
26. Draft, amend, and monitor CSAs.
27. Verify allowable costs prior to claim submission.

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28. Provide Leadership and Workforce Development, External Registration, Required Training, and eLearning metrics for the HR Operations Report.
29. Aid in data collection as required for additional reports.
30. Assign training needs assessment project and approve deliverables.

**J. Instructional System Designers**

1. Conduct an annual training needs assessment and document in an annual training summary report.
2. Design and facilitate internal coursework and is responsible for assisting subject matter experts in identifying relevant content and connecting them with additional training resources. Ensure that all material meets quality standards prior to the course being taught.
3. Design and deliver course content and support learning objectives.

**K. Managers and Supervisors**

1. Ensure all assigned general schedule federal employees have a completed IDP in the LMS.
2. Approve or reject training requests based on available resources and budget.
3. Provide individuals with the time to attend training.
4. Sign and comply with the terms of a CSA upon employee selection.
5. Monitor employee academic progress and Academic Degree Plan completion.
6. Monitor employee performance.
7. May approve employees to attend training during duty hours.
8. Evaluate training travel costs for reimbursement.

**L. Session Coordinators**

1. Identify requirements and training opportunities.
2. Coordinate logistics to provide training in their subject area.
3. Submit requests to enter courses and sessions in the LMS.
4. Monitor enrollment, manage waitlists, and process rosters to document attendance.

**M. Subject Matter Expert**

1. Provide input and review as incumbents and supervisors who are knowledgeable of the job requirements and standards of performance.
2. Provide information to Required Training POCs to ensure accurate knowledge transfer.

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3. Review required training content.

#### N. Training Point of Contacts and Sponsors

1. Identify requirements and training opportunities.
2. Allocate funding and other resources to support training events.
3. Assign a session coordinator to each training event.
4. Liaise with DOE HQ and other relevant regulatory organizations.
5. Allocate resources needed to provide training.
6. Identify, plan, and obtain training events in support of BPA's mission and objectives.
7. Coordinate logistics and advertisements for training events.
8. Represent the Regulatory Sponsor in delivering required training.
9. Liaise with DOE HQ and other relevant regulatory organizations.
10. Coordinate with Learning and Workforce Development to develop and distribute training and communications.
11. Participate in after action review and training improvement activities.
12. Provide content for the SSG.
13. Obtain rosters of training attendees. Certify rosters and provide for session completion.
14. Obtain feedback from instructors and students.
15. Perform a data driven evaluation of the course for improvement and effectiveness.
16. Address any required reporting.

## 5. Program Administration Requirements and Guidance

BPA publishes this HR Desk Reference to ensure that BPA maintains a compliant and structured program supporting its strategic objectives through standardized, consistent processes. BPA must demonstrate that authorized expenditures are defensible. Additionally, BPA must be capable of reconstructing actions as needed for proper program management, evaluation, and audit purposes. This HR Desk Reference aligns with the intent to provide training opportunities across the workforce, including federal and student employees, in accordance with merit system principles. It is specifically crafted to aid managers, supervisors, and human resources professionals in administering employee training and development accurately and efficiently.

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needed or potentially needed duties outside the current position description, or meet other organizational needs as identified in the Talent Management Strategy.

BPA may fund both technical and non-technical training.

- A. BPA will not pay for training involving content prohibited by law. Employees may contact HR Help for information about the content and methods used in any internal training.
- B. BPA will not pay fees for professional certifications or licenses unless specified by collective bargaining agreements or listed on the Approved Certification / License List.
- C. Training programs and courses funded by HR are published annually in the BPA Annual Training Plan. If an employee is a “No Show” for a class that has a vendor cost associated and the seat is unable to be filled, HR will charge the attendee’s organization the per person cost.
- D. Managers may determine to pay for a portion of the cost for non-required/mandated training based on budget availability.
- E. BPA pays employees for hours spent in training during their regularly scheduled workday. BPA will generally not pay premium pay (including overtime) for time spent in training unless criteria met under Fair Labor Standards Act or applicable collective bargaining agreements.
- F. Employees attending offsite training less than the regularly scheduled workday must return to the duty station after completing training if returning is practical when considering travel time. If not practical, e.g., training ends 30 minutes early and the employee is 30 minutes away, the employee will receive pay for the regular workday. If teleworking is an option, the employee should telework to complete their workday scheduled hours.
- G. Managers may adjust an employee’s work schedule so the employee can attend scheduled training on what would otherwise be non-workdays. See BPA HR Directive 410-06: Employee Leave, Work Schedules, and Telework or BPA CPTC collective bargaining agreement and/or Joint Interpretation for Compressed and Non-Standard Hours of Work for more information on work schedules and hours of duty.
- H. Employees participating in the Academic Degree Training Program (ADTP) (excludes student employees) may attend training on duty and/or non-duty hours. Managers and supervisors, at their discretion, may approve employees to attend training during duty hours and receive pay (except overtime, holiday, or night differential pay). In exceptional situations, BPA may pay training related travel costs (travel and per diem) for employees (excludes student employees) training outside their commuting area. Managers and supervisors must approve training related travel costs and the decision to do so must be supported by a compelling business need and authorized according to BPA travel policy and requirements.

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- I. BPA will generally not pay premium pay (including overtime) for time spent in training unless criteria met under Fair Labor Standards Act or applicable collective bargaining agreements.
- J. Employees attending any training costing more than \$7,500 in tuition, or which equals or exceeds \$10,000 in combined tuition and travel costs, or training that equals or exceeds 160 training hours regardless of cost are subject to a Continued Service Agreement (CSA). BPA requires a CSA for electrical apprenticeships and trainee programs.
- K. For the purpose of this HR Desk Reference, the cost of training includes registration fees and travel costs but not salary or wages.

## 6. Processes & Procedures

- A. A Training Needs Assessment (TNA) must be conducted annually and target those mission critical occupational training needs identified by BPA. The TNA serves as a management tool for identifying and tracking mission critical competency gaps and aid in the selection of learning and development solutions.
- B. Managers must ensure all BPA employees have an Individual Development Plan (IDP) in place within 60 days of joining BPA, changing positions (reassignments, promotions, and/or details), or the beginning of a new performance cycle. An IDP provides a tool for employees and managers to improve performance, as well as reach career goals. IDPs document a partnership between employees and managers to align training and development activities to BPA's mission, goals, and objectives. An approved IDP does not constitute a contractual agreement or commit BPA to supporting activities identified in the IDP.
  - 1. An IDP is not required when supervisors and employees jointly determine and record that an IDP would result in little or no benefit to BPA because of an employee's position, expertise, career status, performance level, retirement eligibility or personal circumstances. If an IDP is not required, employees may decline within the LMS.
  - 2. Hourly employees are encouraged to create an IDP but are exempt from the requirement.
  - 3. Non-career and career Senior Executive Service (SES) members are excluded from creating IDPs. Senior executives use an Executive Development Plan (EDP) to outline short-term and long-term development activities that enhance their performance. These activities address organizational needs for leadership, managerial improvement, and results. Executives complete and update their EDPs at least annually.

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- C. Required training encompasses training required by law, regulation, or agency directive. Learning and Workforce Development provides advice and facilitation for course administration as requested. This subset of courses will be coordinated by personnel within Learning and Workforce Development to provide an improved student experience. The Workforce Strategy Committee (WSC) determines courses that are required by all federal employees, all contract employees, all HR professionals, or all managers at BPA.
- D. BPA utilizes a distributed model for training administration. Many organizations within BPA have responsibilities to conduct, monitor, and report on training requirements. Learning and Workforce Development provides guidance and requirements for administration of training. Managers of workgroups with training responsibilities act as sponsors in this process. Sponsors assign a session coordinator to each training event. Learning and Workforce Development provides instructional system designers (ISDs) as a resource to support the development and delivery of courses for BPA's workforce.
- E. BPA allocates budget to managers for training personnel they supervise. All training requires approval and authorization based on available resources. Requests for training must be submitted, approved, and authorized before the training event commences. Managers must prioritize training expenditures in the following order:
1. Training required as part of a Performance Improvement Plan (PIP).
  2. Training documented in an employee's performance plan and review documents or in an Individual Development Plan (IDP).
  3. Other optional training identified by the employee or manager.
- F. Sponsors plan training events including audience, logistical concerns, and advertising events. Sponsors then obtain vendor training options following Bonneville Purchasing Instructions (BPI) requirements and submit to Learning and Workforce Development for vendor authorization.
1. Learning and Workforce Development may purchase commercial, off-the-shelf training. "Commercial, off-the-shelf" is defined as training that requires no design, development, or customization to meet BPA's needs. It is purchased and delivered as is. This generates a completed Vendor Training Purchase Request (VTPR).
  2. If purchased training requires customization, work with your COTR to get a contract in place following the contracting process.
- G. External training represents training events conducted by external entities that BPA sends personnel to attend. Long-term or extended training is defined as learning activities longer than 120 days (960 hours). The training must be administrative, managerial, scientific, or technical in nature.
- H. Session coordinators document attendance for internal training events. Session coordinators provide the verification of attendance either by individuals signing rosters

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in person or by marking a roster for those who attended a virtual session. Session coordinators are responsible for consolidating multiple rosters for a single training event. Session coordinators document students cancelling due to illness or emergency with “excused absence”. Learning and Workforce Development stores training records in BPA’s official training administration and recordkeeping system.

- I. CSAs are processed following the below procedure.
  1. CSAs are not required for any of the following:
    - a) A single work assignment that is separate from a formal training program or an assignment for which only one of the objectives is to develop or assess employee competency levels.
    - b) Coaching, mentoring, or on-the-job training, or similar learning activity.
    - c) Training provided by manufacturers, suppliers, or contractors for the purpose of equipment or operating systems installation, use, or maintenance.
    - d) Training performed under a performance assistance or improvement plan.
  2. The employee, the approving official(s), and HR must sign the CSA before the employee begins training. Failure to sign will forfeit the training opportunity and may impact the employee’s status if employment depends on completing the training.
  3. The service commitment starts when the employee completes the training.
  4. CSA Service commitment calculation.
    - a) The electrical apprenticeship program requires a service commitment of 365 days from completion. See Appendix A.
    - b) The substation operator trainee program requires a service commitment of 365 days from completion. See Appendix B.
    - c) The service commitment for other training meeting the requirements is three times the training credit hours or the time listed in the table below, whichever is greater. See Appendix C.

| <b>Training Cost<br/>(including travel, excluding salary)</b> | <b>Service Commitment</b> |
|---------------------------------------------------------------|---------------------------|
| \$8,000 - \$15,000                                            | 12 months                 |
| \$15,001 - \$25,000                                           | 18 months                 |
| \$25,001 - \$35,000                                           | 24 months                 |
| Greater than \$35,000                                         | 30 months                 |

5. If an employee is in non-pay status 30 days or longer, BPA will extend the service commitment by the total amount of time spent in non-pay status. There are two exceptions where time spent on non-pay status will count on a day-for-day basis

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towards the completion of the service commitment upon the employee's restoration to the duty at BPA in accordance with 5 CFR Part 353:

- a) Employees receiving compensation from the Office of Workers' Compensation Programs (OWCP) for on-the-job injury or illness; or
  - b) Employees serving in the uniformed services.
6. If employee separates from BPA prior to completing the service commitment, the employee may be liable for all or a pro-rated amount of the CSA depending on the reason for separation.

Employees who leave BPA to accept employment with an international organization in which the United States is a member may request a waiver to the amount owed. The Treasury Manager will determine whether the waiver is in the best interest of BPA and the United States.

| Separation Reason                                                                | Impact on CSA                          |
|----------------------------------------------------------------------------------|----------------------------------------|
| Assignment Ends (term appointment, non-conversion at the end of student program) | No CSA amount owed                     |
| Death                                                                            | No CSA amount owed                     |
| Reduction in force                                                               | No CSA amount owed                     |
| Removal (conduct or performance)                                                 | No CSA amount owed                     |
| Resignation (including VSIP)                                                     | CSA amount owed                        |
| Retirement (including VERA)                                                      | CSA amount owed                        |
| Retirement (disability only)                                                     | No CSA amount owed                     |
| Separation due to loss of student status (pathways program)                      | CSA amount owed                        |
| Transfer (to international organization of which United States is a member)      | CSA owed; employees may request waiver |
| Transfer (within federal government but outside of DOE)                          | CSA amount owed                        |
| Transfer (within DOE)                                                            | CSA will transfer to new position      |

7. Calculation of Financial Liability for Voluntary Separation from BPA Prior to Completing Required Continued Service Agreement.
- a) For employees in electrical apprenticeship programs who voluntarily separate from BPA before completing the required post-graduation service, the following rules apply:

|                                                             |                           |                                                   |                       |                               |
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- (1) The amount of financial liability shall be \$111,000 as of graduation for the apprentices hired in 2024. The amount of financial liability for future-year, incoming apprentices, will be adjusted each year by the percentage increase given to CPTC hourly employees as a general wage adjustment (GWA), with the result rounded off to the nearest thousand-dollar increment. For instance, if the GWA for CPTC hourly employees for 2025 is 5.5% the financial liability for 2025 is \$117,000 (Note: The amount of financial liability will be adjusted for apprentices who enter an electrical apprenticeship program above the step 1 level to proportionately reflect the reduced amount of classroom training hours received in order complete the apprenticeship program.)
  - (2) Upon graduation, the financial liability will be reduced proportionately by each day of service (in any position) with BPA (e.g., if the financial liability is \$117,000, each day of service with BPA, whether worked or not and whether in a pay status or not, results in a reduction of financial liability equal to \$320.58).
- b) For employees in the Substation Operator Trainee program who voluntarily separate from BPA before completing the required post-graduation service, the following rules apply:
- (1) The amount of financial liability for training is \$53,000 for 2024. The amount of financial liability for future years will be adjusted each year by the percentage increase for CPTC hourly employees paid as a general wage adjustment rounded to the nearest thousand-dollar increment.
  - (2) Upon completion, the financial liability will be reduced proportionately by each day of service (in any position) with BPA (e.g., if the financial liability is \$53,000, each day of service with BPA, whether worked or not and whether in a pay status of not, results in a reduction of financial liability equal to \$145.21).
- c) Employees who leave BPA/Department of Energy after completing training, but before completing the service commitment will owe a pro-rated amount detailed in the table below.

|                                           |      |
|-------------------------------------------|------|
| Total training cost                       | \$   |
|                                           | ÷    |
| Total calendar days in service commitment | days |
|                                           | =    |

|                                                             |                           |                                                   |                       |                               |  |
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|                                          |      |
|------------------------------------------|------|
| Daily amount                             | \$   |
|                                          | x    |
| Calendar days left in service commitment | days |
|                                          | =    |
| Amount owed                              | \$   |

8. Calculating amounts owed for failure to complete training.

- a) For those who voluntarily leave the apprenticeship program prior to graduation, the amount of financial liability shall be as noted in the table below.

| Employee leaves:         | Liability                                                |
|--------------------------|----------------------------------------------------------|
| As a Step 1-2 Apprentice | No liability                                             |
| As a Step 3 Apprentice   | One-sixth of liability amount required upon graduation   |
| As a Step 4 Apprentice   | One-third of liability amount required upon graduation   |
| As a Step 5 Apprentice   | One-half of liability amount required upon graduation    |
| As a Step 6 Apprentice   | Two-thirds of liability amount required upon graduation  |
| As a Step 7-8 Apprentice | Five-sixths of liability amount required upon graduation |

- b) For those who voluntarily leave the Trainee program prior to graduation, the amount of financial liability shall be as noted in the table below.

| Employee leaves:    | Liability                                                |
|---------------------|----------------------------------------------------------|
| As a Step 1 Trainee | No liability                                             |
| As a Step 2 Trainee | One-third of liability amount required upon completion   |
| As a Step 3 Trainee | One-half of liability amount required upon completion    |
| As a Step 4 Trainee | Two-thirds of liability amount required upon completion  |
| As a Step 5 Trainee | Five-sixths of liability amount required upon completion |

- c) Employees who voluntarily leave BPA/Department of Energy before completing other training that requires a CSA will owe the full cost of training.

9. The BPA Treasury Manager may waive repayment in whole or in part when, in his/her judgment, collection would be against equity and good conscience or not in the best interest of the United States.
10. If an employee fails to reimburse BPA for the amount owed, BPA may collect the amount owed using any means allowed by law. If the employee fails to repay the amount within 30 days of separation, the repayment is subject to interest and late charges.

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- J. BPA pays for individual or corporate memberships in societies, associations, and institutions when such membership is job-related, cost-effective, and not redundant. If payment for a membership will result in a license or other professional credential, the request must be accompanied by a justification that addresses the criteria listed below for professional credentials.
1. The organization requesting and acquiring membership is responsible for budgeting and funding the payment of the membership dues.
  2. When BPA has purchased a corporate membership, it does not normally purchase duplicate individual memberships. Vice Presidents of the Requesting Organization may make exceptions to the payment for an individual membership when BPA has already purchased a corporate membership.
  3. Eligible employees seeking reimbursement for memberships submit requests via form BPA F 2230.06e to their managers for approval.
  4. Managers approve based on available budget and submit the completed form BPA F 2230.06e to Accounts Payable & Receivable (FTOA) for processing.
- K. BPA may pay fees for obtaining and maintaining professional credentials that are considered to further DOE interests or are directly related to an employee's current position (including renewal fees and processing fees), fees to take an examination or series of examinations, and, in limited instances, travel expenses and membership fees provided funds are available. BPA authorizes use of funds available to pay expenses for professional credentials. BPA may request exam scores for professional credential exams. Repercussions, administrative or financial, may occur for failed exams.
1. The BPA Approved Certification/License List is reviewed and updated biannually.
  2. For updating the BPA Approved Certification/License List, managers submit form BPA F 3410.04e to the Senior Executive Service (SES) in their management chain.
  3. The SES approves or denies the request. Approved requests are submitted to Learning and Workforce Development (HT) at [hrtraining@bpa.gov](mailto:hrtraining@bpa.gov).
  4. HT reviews the request to verify that requirements are met. Appropriate requests proceed to Accounts Payable & Receivable for final approval.
  5. Accounts Payable & Receivable determines final disposition for the request. Approved requests are returned the HT for inclusion in the BPA Approved Certification/License List.
  6. BPA will only reimburse employees upon successful completion of the exam or the license or certification process required to obtain or maintain a professional credential for a position. This does not apply to credentials required to qualify for a position. If an employee takes a license or certification test and fails, then

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subsequently retakes the test and passes, BPA will pay only one fee, either the original or a retesting fee, whichever is higher.

7. Eligible employees seeking reimbursement for certification fees submit requests via form BPA F 2230.03e to their managers for approval.
  8. Managers approve based on available budget and submit the completed form BPA F 2230.03e to Accounts Payable & Receivable (FTOA) for processing.
- L. The Academic Degree Training Program (ADTP) assists managers and BPA-HRSC to effectively administer and provide resources for BPA. The authority (5 CFR § 410.308) allows a federal agency to pay for or reimburse education costs for such a degree not for an employee benefit; rather it must primarily benefit the agency, e.g., development of employees into mission critical occupations; or to solve a legitimate identified staffing problem, e.g., demonstrated difficulty in hiring particular occupations; or identified training need for the organization, e.g., need for knowledge of specific technological advancements).
1. Recruitment & Placement Office creates training interest or vacancy announcements to competitively select eligible employees for participation in ADTP offerings.
  2. Academic Degree Plans must be completed and submitted by selectees 45 days prior to beginning the training program.
  3. BPA exercises the discretion to decide if it will pay all or part of the allowable costs associated with an employee's academic program and decides the overall curriculum and funding limits. Employees or managers should not assume that BPA will cover allowable costs. The employee bears responsibility for any costs beyond those specified in Part I of the Academic Degree Plan.
- M. Learning and Workforce Development (HT) monitors separations and position changes to determine if an active CSA warrants a collection action. Learning and Workforce Development notifies Accounts Payable & Receivable (FTOA) if a repayment action is identified. HT provides the name, reason for requiring repayment, and the amount to be collected based on the prorated remaining obligation. HT notifies the employee through their manager of the collection action, reason for repayment, and the amount to be repaid. FTOA determines methods of repayment and processes the collection following relevant policy and internal procedures.

## 7. Performance & Monitoring

The performance and monitoring of Learning and Workforce Development activities is accomplished through the following standards, metrics, and reporting.

### A. Standards:

1. External training requests for non-conference training events are registered within five business days after manager approval received.

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2. Conference events are registered within one business day after approval through the DOE iPortal Conference process.
3. Courses are catalogued within 48 hours of course session request received.
4. The BPA Approved Certification/License List is updated biannually.

**B. Metrics:**

1. External training request processing period from manager approval to student registration.
2. Course session request processing period from date of submission to session catalogued.
3. Individual development plan compliance measured from number of IDPs divided by the number of general schedule federal employees.
4. External training request costs include tuition, travel, discounts, and refunds.
5. Attendance and participation levels determined by completed attendance in BPA's system of record.

**C. Reporting:**

1. The Training Needs Assessment is documented with an Annual Training Plan.
2. The Annual Training Summary reports the Annual Training Plan effectiveness and informs the next Training Needs Assessment.
3. Learning and Workforce Development produces compliance reports on individual development plans from the repository and provides to BPA management and DOE.
4. Recruitment & Placement Office produces compliance reports on executive development plans from the repository and provides to BPA management and DOE.
5. Learning and Workforce Development creates a required training annual project plan based on fiscal year and reports compliance rates to BPA management.
6. Learning and Workforce Development reports courses offered, participation levels, eLearning development, external registration expenses, and required training compliance on the HR Operations Report.
7. Learning and Workforce Development creates a Professional Certification Summary with all changes covered during each update cycle.

## 8. Contacts

- A. For information on Workforce and Leadership Development, contact HR Training through the Service Management Portal or email [hrtraining@bpa.gov](mailto:hrtraining@bpa.gov).

|                                                             |                           |                                                   |                       |                               |
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## 9. Authorities & References

- A. [DOE Order 360.1D](#): Federal Employee Training
- B. 5 U.S.C., Chapter 41, Training
- C. 5 U.S.C. 2301, Merit System Principles
- D. 5 U.S.C. 4109, Expenses of Training
- E. 5 U.S.C. 5757, Payment of Expenses to Obtain Professional Credentials
- F. 5 U.S.C., Chapter 5514
- G. 5 CFR, Part 410, Training
- H. 5 CFR, Part 550 subpart K (550.1110)
- I. Section 625 of the Treasury and General Government Appropriations Act of 2000
- J. Equal Employment Opportunity Notice N-915.022
- K. Executive Order 1311, Using Technology to Improve Training Opportunities for Federal Government Employees

## 10.Revision History

| Version Number | Issue Date | Brief Description of Change or Review                                                                                                                                                                                                                                                                                                                                                                         |
|----------------|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.0            | 07/23/2025 | First published version. BPA HRSC guidance revised to align with DOE Order 360.1D (HRD 410-04 obsolete/discontinued). HR DR 410-04-02 discontinued. This HR DR aligns with DOE Order 360.1 requirements and updates.                                                                                                                                                                                          |
| 2.0            | 10/17/2025 | Updated Terms & Definitions, Program Administration, Processes & Procedures, Authorities & References, and Performance & Monitoring sections to address reimbursement policies for memberships and certifications.<br><br>Updated Responsibilities and Terms & Definitions to make the Desk Reference platform neutral.<br><br>Additional changes made for readability and improved definition of terms used. |

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# Appendix A: Apprenticeship Continued Service Agreement

## Continued Service Agreement Apprenticeship

This continued service agreement is an agreement between the Bonneville Power Administration (BPA) and/or successor organizations and the employee (referred to as “I” or “me”).

I, *(insert name)*, have read and understand this continued service agreement and the provisions of the Employee Development and Training Desk Reference that describes continued service agreements (CSAs) for training.

### Length of Service

1. I agree that upon completion of my BPA sponsored apprenticeship training I will complete at BPA a period of post-training service equal to one year or 365 days.
  - a. I agree that the total potential liability for the service commitment is \$ *(insert estimated training cost)*.
  - b. This amount has a daily value of \$ *(insert amount)*.
2. I agree that I must complete my service commitment with BPA or other DOE departmental element.

### Reimbursement

3. I agree that if I voluntarily leave BPA/Department of Energy before successfully completing the apprenticeship program I am liable to BPA for a portion of the full amount of the cost of the training I received as described below, payable within 30 days of my separation from BPA.

| Employee leaves          | Liability                       |
|--------------------------|---------------------------------|
| As a Step 1-2 Apprentice | \$0                             |
| As a Step 3 Apprentice   | <i>(1/6 x the amount in 1a)</i> |
| As a Step 4 Apprentice   | <i>(2/3 x the amount in 1a)</i> |
| As a Step 5 Apprentice   | <i>(1/2 x the amount in 1a)</i> |
| As a Step 6 Apprentice   | <i>(2/3 x the amount in 1a)</i> |
| As a Step 7-8 Apprentice | <i>(5/6 x the amount in 1a)</i> |

|                                                             |                           |                                                   |                       |                               |
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4. I agree that if I voluntarily leave BPA/Department of Energy, including to work for another federal Agency, after completing the training program described and prior to completing my service commitment I am liable to BPA for the value of any service days not completed within 30 days of my separation. The total potential liability amount will be reduced by the daily value identified in 1.b. for each day I was a BPA employee after my completion of the training program.
5. I agree that any amount that may be due BPA as a result of failure on my part to meet the terms of this continued service agreement will be repaid to BPA and may be withheld from any monies owed to me by BPA or may be recovered by other methods as allowed by law.
6. If I am determined to be indebted to BPA, I have the right to file a request for a waiver of any indebtedness that I may have to BPA under this service agreement based on a demonstration by me that BPA's recovery of such indebtedness, in whole or in part, would be against equity and good conscience or against the public interest. The filing of such a waiver request will not stay the operation of BPA's debt collection procedures. I must file the request with my immediate supervisor.

#### **Amendments**

7. BPA will unilaterally amend this agreement for the following reasons:
  - a. As required by applicable laws or regulations.
  - b. To extend the service commitment resulting from periods of leave without pay (LWOP) or other periods during which I am not in a pay status (exception: absence due to uniformed service or compensable injury is creditable towards the service commitment).

#### **Other**

8. I acknowledge that this agreement does not in any way commit BPA to continue my employment.

|                                                             |                           |                                                   |                       |                               |
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**Apprenticeship start date** \_\_\_\_\_  
**Apprenticeship anticipated graduation date** \_\_\_\_\_

*This Service Agreement is not valid unless signed by all parties:*

I agree to the terms and conditions identified in this Agreement:

\_\_\_\_\_  
Employee Name (Print)                      Signature                      Date

By my signature below I certify that I have delegated authority to enter into the Agreement on behalf of BPA:

\_\_\_\_\_  
Supervisor/Manager Name (Print)                      Signature                      Date

By my signature below I certify that I have reviewed this Continued Service Agreement (CSA) and verify it meets the terms and conditions the Employee Development and Training Desk Reference:

\_\_\_\_\_  
HCM Authorized Employee Name                      Signature                      Date  
(Print)

|                                                             |                           |                                                   |                       |                               |
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# Appendix B: Substation Operator Trainee Continued Service Agreement

## Continued Service Agreement Non-Apprenticeship

This continued service agreement is an agreement between the Bonneville Power Administration (BPA) and/or successor organizations and the employee (referred to as “I” or “me”).

I, *(insert name)*, have read and understand this continued service agreement and the provisions of the Employee Development and Training Desk Reference that describes continued service agreements (CSAs) for training.

### Length of Service

9. I agree that upon completion of my BPA sponsored training program I will complete, at BPA, a period of post-training service equal to one year or 365 days.
  - a. I agree that the total potential liability for the service commitment is \$ *(insert estimated training cost)*.
  - b. This amount has a daily value of \$ *(insert amount)*.
10. I agree that I must complete my service commitment with BPA or other DOE departmental element.

### Reimbursement

11. I agree that if I voluntarily leave BPA/Department of Energy before successfully completing the apprenticeship program I am liable to BPA for a portion of the full amount of the cost of the training I received as described below, payable within 30 days of my separation from BPA.

| Employee leaves:    | Liability <sup>1</sup>                                   |
|---------------------|----------------------------------------------------------|
| As a Step 1 Trainee | No liability                                             |
| As a Step 2 Trainee | One-third of liability amount required upon completion   |
| As a Step 3 Trainee | One-half of liability amount required upon completion    |
| As a Step 4 Trainee | Two-thirds of liability amount required upon completion  |
| As a Step 5 Trainee | Five-sixths of liability amount required upon completion |

<sup>1</sup> The amount in 1(a) above.

|                                                      |                    |                                            |                |                        |
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12. I agree that if I voluntarily leave BPA/Department of Energy, including to work for another federal Agency, after completing the training program described and prior to completing my service commitment I am liable to BPA for the value of any service days not completed within 30 days of my separation. The total potential liability amount will be reduced by the daily value identified in 1.b. for each day I was a BPA employee after my completion of the training program.
13. I agree that any amount that may be due BPA as a result of failure on my part to meet the terms of this continued service agreement will be repaid to BPA and may be withheld from any monies owed to me by BPA or may be recovered by other methods as allowed by law.
14. If I am determined to be indebted to BPA, I have the right to file a request for a waiver of any indebtedness that I may have to BPA under this service agreement based on a demonstration by me that BPA's recovery of such indebtedness, in whole or in part, would be against equity and good conscience or against the public interest. The filing of such a waiver request will not stay the operation of BPA's debt collection procedures. I must file the request with my immediate supervisor.

#### **Amendments**

15. BPA will unilaterally amend this agreement for the following reasons:
- a. As required by applicable laws or regulations.
  - b. To extend the service commitment resulting from periods of leave without pay (LWOP) or other periods during which I am not in a pay status (exception: absence due to uniformed service or compensable injury is creditable towards the service commitment).

#### **Other**

16. I acknowledge that this agreement does not in any way commit BPA to continue my employment.

|                                                             |                           |                                                   |                       |                               |
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Trainee start date \_\_\_\_\_  
Trainee anticipated completion date \_\_\_\_\_

*This Service Agreement is not valid unless signed by all parties:*

I agree to the terms and conditions identified in this Agreement:

\_\_\_\_\_  
Employee Name (Print)                      Signature                      Date

By my signature below I certify that I have delegated authority to enter into the Agreement on behalf of BPA:

\_\_\_\_\_  
Supervisor/Manager Name (Print)                      Signature                      Date

By my signature below I certify that I have reviewed this Continued Service Agreement (CSA) and verify it meets the terms and conditions the Employee Development and Training Desk Reference:

\_\_\_\_\_  
HCM Authorized Employee Name                      Signature                      Date  
(Print)

|                                                             |                           |                                                   |                       |                               |
|-------------------------------------------------------------|---------------------------|---------------------------------------------------|-----------------------|-------------------------------|
| <b>Organization</b><br>Workforce and Leadership Development |                           | <b>Title</b><br>Employee Development and Training |                       | <b>Unique ID</b><br>410-04-01 |
| <b>Author</b><br>HT                                         | <b>Approved by</b><br>HRD | <b>Date</b><br>10/17/2025                         | <b>Version</b><br>2.0 | Page 27                       |

# Appendix C: Non-Apprenticeship Continued Service Agreement

## Continued Service Agreement Non-Apprenticeship

This continued service agreement is an agreement between the Bonneville Power Administration (BPA) and/or successor organizations and the employee (referred to as “I” or “me”).

I, (*insert name*), have read and understand this continued service agreement (CSA) and the provisions of the Employee Development and Training Desk Reference that describes continued service agreements (CSAs) for training.

### Length of Service

1. I agree that upon completion of my BPA sponsored training (*insert training title and date here*) I will complete at BPA a period of post-training service equal to (*insert service commitment here in months and years*). See Chart on page 8. Minimum is 1 year. The service commitment starts on (date) and terminates on (date).
  - a. I agree that the total potential liability for the service commitment is \$ (*insert training cost*).
  - b. This amount has a daily value of \$ (*insert amount*).
2. I agree that I must complete my service commitment with BPA or other DOE departmental element.

### Reimbursement

3. I agree that if I voluntarily leave BPA/Department of Energy before successfully completing the training program I am liable to BPA for the full amount of the cost of the training I received, payable within 30 days of my separation from BPA.
4. I agree that if I voluntarily leave BPA/Department of Energy, including entering the service of another Federal agency, after completing the training program described and prior to completing my service commitment I am liable to BPA for the value of any service days not completed. The total potential liability amount will be reduced by the daily value identified in 2.b. for each day I was a BPA employee after completing the training program.

|                                                             |                           |                                                   |                       |                               |
|-------------------------------------------------------------|---------------------------|---------------------------------------------------|-----------------------|-------------------------------|
| <b>Organization</b><br>Workforce and Leadership Development |                           | <b>Title</b><br>Employee Development and Training |                       | <b>Unique ID</b><br>410-04-01 |
| <b>Author</b><br>HT                                         | <b>Approved by</b><br>HRD | <b>Date</b><br>10/17/2025                         | <b>Version</b><br>2.0 | Page 28                       |

5. I agree that any amount that may be due BPA, as a result of failure on my part to meet the terms of this continued service agreement (CSA) will be repaid to BPA and may be withheld from any monies owed to me by BPA or may be recovered by other methods as allowed by law.
6. If I am determined to be indebted to BPA, I have the right to file a request for a waiver of any indebtedness that I may have to BPA under this service agreement based on a demonstration by me that BPA's recovery of such indebtedness, in whole or in part, would be against equity and good conscience or against the public interest. The filing of such a waiver request will not stay the operation of BPA's debt collection procedures. I must file the request with my immediate supervisor.

#### **Amendments**

7. BPA will unilaterally amend this agreement for the following reasons:
  - a. As required by applicable laws or regulations.
  - b. To extend the service commitment resulting from periods of leave without pay (LWOP) as described in PL 410-01 or other periods during which I am not in a pay status (exception: absence due to uniformed service or compensable injury is creditable towards the service commitment).
  - c. To establish a different service commitment resulting from modifying my training assignment.

#### **Other**

8. I acknowledge that this agreement does not in any way commit BPA to continue my employment.

|                                                             |                           |                                                   |                       |                               |
|-------------------------------------------------------------|---------------------------|---------------------------------------------------|-----------------------|-------------------------------|
| <b>Organization</b><br>Workforce and Leadership Development |                           | <b>Title</b><br>Employee Development and Training |                       | <b>Unique ID</b><br>410-04-01 |
| <b>Author</b><br>HT                                         | <b>Approved by</b><br>HRD | <b>Date</b><br>10/17/2025                         | <b>Version</b><br>2.0 | Page 29                       |

**This Service Agreement is not valid unless signed by all parties**

I agree to the terms and conditions identified in this Agreement:

|                       |           |      |
|-----------------------|-----------|------|
| Employee Name (Print) | Signature | Date |
|-----------------------|-----------|------|

By my signature below I certify that I have delegated authority to enter into the Agreement on behalf of BPA:

|                                    |           |      |
|------------------------------------|-----------|------|
| Supervisor or Manager Name (Print) | Signature | Date |
|------------------------------------|-----------|------|

By my signature below I certify that I have delegated authority to enter into the Agreement on behalf of BPA:

|                                  |           |      |
|----------------------------------|-----------|------|
| Approving Official Name (Print)* | Signature | Date |
|----------------------------------|-----------|------|

\* Second level of approval required for training costing three times the annual per capita training budget or more unless the supervisor or manager is a vice president or Tier II manager in organizations without a vice president. Cost calculation includes travel but not salary.

By my signature below I certify that I have reviewed this Continued Service Agreement (CSA) and verify it meets the terms and conditions of the Employee Development and Training Desk Reference.

|                                      |           |      |
|--------------------------------------|-----------|------|
| HCM Authorized Employee Name (Print) | Signature | Date |
|--------------------------------------|-----------|------|

|                                                      |                    |                                            |                    |                        |         |
|------------------------------------------------------|--------------------|--------------------------------------------|--------------------|------------------------|---------|
| Organization<br>Workforce and Leadership Development |                    | Title<br>Employee Development and Training |                    | Unique ID<br>410-04-01 |         |
| Author<br>HT                                         | Approved by<br>HRD |                                            | Date<br>10/17/2025 | Version<br>2.0         | Page 30 |