

BPA Human Resources Directive 410-04

Employee Development and Training

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1. Purpose & Background

Communicates BPA-wide guidance for training and developing Federal employees as permitted by Government-wide regulations and applicable Department of Energy (DOE) policy.

2. Policy Owner

The Chief Administrative Officer, through Human Capital Management's (HCM) Integrated Strategy (NHI-1), has overall responsibility for monitoring, reporting, executing, and maintaining this policy.

3. Applicability

Except where noted, this policy applies to all BPA General Schedule (GS) or equivalent and hourly employees.

4. Terms & Definitions

- A. **Academic Degree Training:** Post-secondary education for the organizational purpose of providing an employee/student with an associate, bachelor, master, or doctoral degree or a graduate certificate. The academic degree must contribute significantly to meeting an identified training need, resolving a staffing problem, or accomplishing goals in the agency's strategic plan; it must be part of a planned, systemic and coordinated agency employee development program linked to accomplishing the strategic goals of the agency; and is accredited by a nationally recognized body.
- B. **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 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).
- C. **Mandatory Training:** Training a manager/supervisor requires an employee to complete because the knowledge, skills, or competencies gained are necessary for the employee to successfully perform the job (different from required training).
- D. **Required Training:** Training BPA and/or DOE requires for all employees or for a specific group or groups.

5. Policy

BPA requires local training plans to establish an integrated cycle of organizational needs analysis, training planning, needs assessment, resource allocation, design and delivery, evaluation, and reporting processes. BPA provides training and development to improve productivity and performance while enabling employees and organizations to meet BPA's mission and business objectives. In compliance with Merit Systems Principles,

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managers/supervisors observe fair and equitable consideration of employees for training and developmental opportunities and use competitive selection procedures when appropriate.

6. Responsibilities

As stated in applicable HR Desk References and/or Standard Operating Procedures (see “Related HR Desk References” section).

7. Standards & Procedures

7.1. Requirements

- A. BPA only pays for training and development activities that support BPA 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.
- B. BPA will provide Career Transition Assistance Plan (CTAP) services, training, or retraining to assist displaced and surplus BPA employees.
- C. Merit promotion procedures are followed when selecting employees for training opportunities that are primarily to prepare trainees for advancement or to allow an employee to meet the requirements for a position with higher promotion potential.
- D. External training should be approved at least two weeks in advance of the start date (except for BPA-required training which does not need to be approved in HRMIS).
- E. 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. The Human Resources Management Information System (HRMIS) is used to request, approve, deny, and record all training activities. An employee’s training record must be available to him/her upon reassignment, transfer, or separation and accessible while employed by DOE/BPA.
- G. BPA has discretion in determining the training costs it pays, as permitted by law. Allowable training costs are addressed in the applicable HR Desk Reference 410-04-02. This includes when an employee attends training in a pay or non-pay status.
- H. Employees unable to attend training must cancel in HRMIS at least 5 business days in advance. Employees unable to attend training due to emergency circumstances, e.g., accident or illness must notify HR Help as soon as possible. Participants who fail to complete scheduled training must reimburse BPA for tuition and/or other training costs

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unless completion requirements are waived by an official with delegated authority and with Human Resources Management concurrence.

- I. Only trained and certified consultants may administer psychological and career assessment instruments.
- J. BPA’s Apprenticeship Training Programs are conducted in accordance with the Collective Bargaining Agreement between BPA and the Columbia Power Trades Council (CPTC) which provides for the establishment and maintenance of an apprenticeship program.
- K. BPA’s program for accelerated training and promotion of annual (GS) employees in certain documented shortage categories requires both the manager and the candidate/employee to sign a Memorandum of Agreement and a Training Plan prior to the employee’s assignment at the entry grade level. Directive guidance is described in BPA HR Directive 410-03: Hiring, Selecting, and Assigning Employees.
- L. BPA’s program for *consecutive* accelerated training and promotion of candidates/employees at grades GS-5 to GS-12 in critical shortage occupations requires a formal Training Agreement that is approved through DOE by the Office of Personnel Management (OPM). Directive guidance is described in BPA HR Directive 410-03: Hiring, Selecting, and Assigning Employees.
- M. Managers and supervisors approve employee training.
- N. A supervisor, with the concurrence of the Human Resources Director (HRD) or his/her designee may waive an employee’s required reimbursement of training costs should the employee fail to complete scheduled training.
- O. The HRD must approve the accelerated training and promotion plan training agreement before it may be used as authority for any personnel actions.
- P. The HRD approves line organizations’ requests for occupations to be covered under the Consecutive Accelerated Training Promotion Program before submission to OPM through DOE.

7.2. Individual Development Planning

- A. Evaluation and identification of employees’ strengths and development needs are completed annually, or earlier in the event of a position change.
- B. Employees are encouraged to partner with their manager in developing an Individual Development Plan (IDP) for the employee.
- C. All Senior Executives are required to have an Executive Development Plan (EDP).
- D. Participants in the Pathways program are required to have an IDP in accordance with the current DOE/OPM Pathways memorandum of agreement.

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7.3. Continued Service Agreement (CSA)

- A. BPA requires a CSA for electrical apprenticeships.
- B. A CSA is required for each training activity that costs \$8,000 or more or is 180 hours or more in length regardless of cost (cost of training includes registration fees and travel costs, but not salary or wages). Academic degree training is addressed in a separate section below.
- C. The following are excluded from the CSA requirement:
 - 1. Training under a Performance Improvement Plan (PIP); and
 - 2. Mandatory training required by the supervisor.
- D. The specific CSA to be used is addressed in the applicable HR Desk Reference or Standard Operating Procedure and is different for employees in any electrical apprenticeship program.
- E. The length of the service commitment and basis for calculating the service commitment is specified in the applicable HR Desk Reference Employee Development and Training.
- F. CSAs are administered as described in the applicable HR Desk Reference or Standard Operating Procedure, which includes guidance on when repayment of training costs is necessary, e.g., failure to complete service commitment, and how to determine the amount of repayment.
- G. The BPA Treasury Manager may waive repayment of training costs in whole or in part with written HRD concurrence.

7.4. Academic Degree Training

- A. BPA uses academic degree training as part of its overall planned, systemic and coordinated program to provide employees effective education and training to improve performance and accomplish strategic goals. Academic degree training is not an employee benefit or used to qualify an employee for an appointment to a particular position for which the academic degree is a basic requirement.
- B. Selection and assignment to academic degree training must follow Federal merit promotion requirements and competitive procedures.
- C. BPA will not pay or reimburse academic degree training costs for an employee already receiving tuition benefits from a veterans' educational assistance program for the same training activity (38 U.S.C. 3681). This ensures that multiple payments are not made for the same training activity. This restriction also applies to Federal fellowships, scholarships and grants. BPA does not consider loans when deciding whether to grant disbursement or in calculating the amount the student is eligible to receive for academic degree training.

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- D. All intellectual property directly resulting from an employee’s academic degree training funded by BPA is the property of BPA.
- E. Employees may not use BPA resources, such as time and materials, to complete coursework unless the coursework directly relates to and supports the student’s BPA work assignments and the manager approves use of such resources in advance and in writing.
- F. Each individual approved for academic degree training must have an Academic Degree Plan.
- G. Employees must meet and maintain performance, conduct and academic standards required by BPA in order to be approved for or retained in the program.
- H. A CSA is required for academic degree training regardless of the total number of training hours paid by BPA. The length of the service commitment and basis for calculating the service commitment is specified in the applicable HR Desk Reference or Standard Operating Procedure.
- I. The CSA is administered as described in the applicable HR Desk Reference or Standard Operating Procedure and includes guidance on repayment of training costs.
- J. BPA unilaterally amends the CSA when warranted, as described in the applicable HR Desk Reference or Standard Operating Procedure.
- K. The Deputy Administrator, Chief Operating Officer, and Senior Vice Presidents, or their delegates, approve academic degree training for employees under their administrative jurisdiction.

8. Authorities & References

- A. 5 U.S.C. 4103, Establishment of Training Programs
- B. 5 U.S.C. 4107, Academic Degree Training
- C. 5 U.S.C. 4108, Employee Agreement; Service after Training
- D. 5 U.S.C. 4109, Expenses of Training
- E. 5 U.S.C. 4121, Specific Training Programs
- F. 5 CFR Part 410, Training
- G. 5 CFR Part 412, Supervisory, Management, and Executive Development
- H. DOE O 360.1C, Federal Employee Training
- I. DOE Federal Employee Training HR Desk Reference
- J. United States Office of Personnel Management (OPM):
[Guidance on Training Restrictions - Public Law 105-277](#)

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K. DOE O 360.1C, Federal Employee Training

L. DOE Federal Employee Training HR Desk Reference

M. Related HR Desk References:

1. 410-04-01: Academic Degree Training Program

2. 410-04-02: Employee Development and Training

9. Revision History

This chart contains a history of the revisions and reviews made to this document.

Version Number	Issue Date	Brief Description of Change/Review
1.0	1/19/2016	Initial publication.
2.0	4/18/2016	Style, formatting, and grammar changes.

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