Advanced Facility Management Practices
Instructor Manual

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Indiana University Cooperative Agreement CA 2670-97-001

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Teresa Dickinson  National Park Service  Christy McCormick  Eppley Institute
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Tim Harvey  National Park Service  Matt Wolf  Eppley Institute
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Preface

Advanced Facility Management Practices
DEDICATION: THE GREG MCGUIRE CLASS OF 2008-2009

Greg McGuire Honored
When asked what qualities make a good leader in the National Park Service, those who know him point to Greg McGuire. Dedicated to his parks and to the preservation of natural and cultural resources, Greg believes that the experience of the visitors is the top priority for National Park Service employees and he has spent his entire career at Fort McHenry National Monument and Historic Shrine and at the Hampton National Historic Site (FOMC/HAMP) putting those beliefs into action.

“These parks are Greg's life, and his tireless devotion to this site is evident by the vision he has,” said Wayne Boyd, FMLP '09 Participant.

A firm believer in “green” and sustainable technologies, Greg has been a leader within the NPS for the application of environmentally friendly options in park facilities. Greg was instrumental in the Natural Resource Protection Program, working in unison with the Baltimore National Aquarium to preserve the wetlands surrounding Fort McHenry. This is only one example of the way in which Greg chose to lead from the front, keeping the bar high by motivating his employees to strive for the best within themselves. To one NPS employee, Greg is the embodiment of “integrity, professionalism, and pride in the National Park Service.”

“Greg is inspirational in teambuilding, communications, and leadership,” wrote William Osterhaus, FMLP '08, of his mentor.

Greg served two separate details as a Facility Manager in his years of service to the NPS: one to Biscayne Bay National Park in Florida, and another to Gulf Islands National Park (GUIS) to aid in the cleanup after Hurricane Katrina. During the detail to GUIS Greg was instrumental in restoring some of the critical services to facilities that had been destroyed. Management at both Biscayne Bay and at Gulf Islands asked him to stay on as Facility Manager at the end of his detail, but Greg chose to return to Maryland each time.

Greg worked his way up from a temporary worker in the mid-1970s to become the Supervisory Facility Operations Specialist at FOMC/HAMP in 2003 and has become highly respected within the NPS in the process. In the intervening years he has served on several advisory boards for maintenance issues in the Northeast region and for a time was chairman of the Northeast Region Maintenance Advisory Group. During those years he has also received several awards, including: the Volunteer Service Award in recognition of his “devoted service and invaluable contributions to the students and staff of the Maryland School for the Blind”; the
Work Experience Supervisor of the Year (1991); Maintenance Chief of the Year (1994); the Director’s Award (1997); the Regional Director’s Award for Excellence in Natural Resources Stewardship Through Maintenance for the Northeast Region (1998); the Coastal America 2000 Partnership Award for his work on the Fort Henry Wetland Restoration; the Northeast Region Natural Resources Maintenance Employee of the Year (2001); the Northeast Region Maintenance Partnership Award (2001); the Director’s Award 2003—Excellence in Natural Resources Stewardship Through Maintenance; the Northeast Region’s Roy E. Appleman – Henry A. Judd – Ralph E. Lewis Award for Excellence in Cultural Resource Stewardship through Maintenance (2006); and the 2008 Energy Engineer of the Year Award for Region II (MD-FL).

Greg is currently living with his wife, Donna, in Pasadena, MD. Their two adult children, Christina and Nick, both live nearby in the Baltimore area.

In recognition of his many accomplishments in his years of service, the Facility Manager Leaders Program class of 2008-2009 has chosen to name themselves after Greg McGuire.
INTRODUCTION

Introduction to the Course
The Advanced Facility Management Practices (AFMP) is the third course of a five-part, year-long course of study. This two-week course will focus on the competencies that future leaders in Facility Management need to develop. The AFMP course will give students an opportunity to learn and practice elements such as the following:

- Asset Management – Using the SEOT simulation, students will develop competencies in asset management, applying life cycle business practices to the fictitious park unit and generating necessary annual plans, supporting FMSS work orders, revised PAMP content and all required efforts to bring SEOT’s asset management program forward.
- Sustainability – Students will be provided a broad introduction to policy and regulations as they apply to sustainability.
- Budgeting – Students will be provided an introduction to basic budgeting procedures as they relate to Facility Management.
- Informal Visitor Contact – Employees in Maintenance have frequent contact with park visitors. The students will be provided with an introduction to skills in Interpretation as they apply to Facility Management.
- Supervision, Management, and Leadership – The students will continue to build on leadership skills learned in the Principles of Asset Management course and further developed during their independent study projects. They will also be introduced to basic elements of supervision and leadership.
- Technical Writing – Technical writing skills are critical in the professional development of facility managers. A five-hour session highlighting basic technical writing skills will be presented to the students.

The Problem and Need
Over the past 35 years, the National Park Service (NPS) facility management profession has evolved into a complex, mission-critical discipline. Being a facility manager in the 21st century requires insights, choices, and actions within a very competitive environment. Facility management in the Federal sector enjoys a much higher profile than ever before. In-depth studies conducted by the National Academy of Science’s Federal Facilities Council Report state:

“…facilities managers can no longer be regarded only as caretakers who bring unwelcome news about deteriorating facilities and the need for investments. As facilities management has evolved from tactical, building-oriented activities to a strategic, portfolio-based approach, the skills required by facilities management organizations have similarly evolved. … [This evolution] requires not only the technical skills (e.g., engineering, architecture, mechanical, electrical, contracting) found in traditional facilities engineering organizations but also business acumen and communication skills.”
Both the Department of the Interior (DOI) and the NPS have targeted the facility management profession as "mission-critical" because of the importance of maintaining the built environment and the high numbers of facility managers eligible to retire in the near future. In anticipation of the growing need for competent, able facility managers, the NPS has developed a comprehensive set of facility manager competencies to form a roadmap for development of our facility management workforce. Additionally, the Facility Manager Leaders Program (FMLP), of which the Advanced Facility Management Practices course is the third out of five separate courses, aims to build a core group of competent, up-and-coming facility managers to serve as leaders of facility management in the NPS in the years to come.

**Course Goals**

Following completion of this course, students will be able to do the following:

- Plan operations, maintenance, repair, and alterations functions by creating an Annual Work Plan
- Revise plans through evaluation to fit within budgeted funds.
- Identify and utilize human, paper, and electronic resources to guide decision-making and planning process.
- Analyze and evaluate data from multiple sources to inform planning and management decisions

**Instructor Resources**

**Outlines and Lesson Plans**

This instructor manual provides you with an outline and lesson plans for each course session. The outline provides an overview of the different elements you will need to cover during the module. It also provides you with objectives, training aids and handouts, facilitator notes, and other points to remember.

The lesson plans are designed to guide you through the main elements and learning objectives introduced in each module. Here you will find much greater informational depth about specific activities and learning objectives, as well as instructional techniques and tips for leading the learners.

**Session Length**

Each lesson plan lists an approximate session length for instructor or guest speaker consideration. Because this is a survey course covering a number of topics, it is important to review the session lengths and attempt to stay within the allotted time. However, session length can be adjusted to a small degree to fit instructor style, learner personalities and needs, and other factors.

**Handouts and Instructor Materials**

Also included in this course are various training aids, including hardcopies of handouts and other materials. The Student Workbook contains most of the handouts, documents, and worksheets needed for the course. Each course unit and session lists the handouts and other training materials you will need for it. Please make yourself familiar with these resources and their content.
Additionally, because this is a manual for a simulation, and it is important to easily distinguish between role-playing and real life, the manual will occasionally refer to situations as either in-sim or out-sim. In-sim situations are role-playing situations in which students and/or instructors are pretending as though the simulation events were actually happening instead of being simulated. Out-sim refers to situations in which participants behave as they would in everyday life, with knowledge that they are involved in a simulated training exercise at AFMP. Unless otherwise noted, assume that all sessions after the first day (except One-Minute Papers) are in-sim.
# Course Agenda

## AFMP Draft Agenda

### Week I

#### Monday, October 20th, 2008

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am-8:45 am</td>
<td>Course Introduction and Welcome to the Park</td>
<td>Betsy Dodson, Woody Smeeck, Dan Blackwell</td>
</tr>
<tr>
<td>8:45 am-11:30 am</td>
<td>Student Presentations</td>
<td>Students</td>
</tr>
<tr>
<td>11:30 am-12:30 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:30 pm-3:00 pm</td>
<td>Student Presentations (continued)</td>
<td>Students</td>
</tr>
<tr>
<td>3:00 pm-4:00 pm</td>
<td>Asset Management Program Update</td>
<td>Don Mannel and Dan Blackwell</td>
</tr>
<tr>
<td>4:00-4:15 pm</td>
<td>Lecturette: Unplanned Work</td>
<td>Don Mannel</td>
</tr>
<tr>
<td>4:15 pm-4:45 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Christy McCormick</td>
</tr>
</tbody>
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#### Tuesday, October 21st, 2008

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00-8:15 am</td>
<td>The Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:15 -9:30 am</td>
<td>Introduction to Sea Otter Island</td>
<td>Steve Wolter (webcast)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Don Mannel</td>
</tr>
<tr>
<td>9:45-11:45 am</td>
<td>Discussion of Scientific Method and Data Analysis Tools</td>
<td>Zach Carnagey, Steve Homan</td>
</tr>
<tr>
<td>11:45-12:45 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:45-2:00 pm</td>
<td>Work Types and their importance in developing an Annual Work Plan</td>
<td>Jeri Mihalic</td>
</tr>
<tr>
<td>2:15-2:30 pm</td>
<td>Lecturette: Productive Hours of your Workforce</td>
<td>Dan Blackwell</td>
</tr>
<tr>
<td>2:15-4:15 pm</td>
<td>Project Management Information System</td>
<td>Sherry Plowman</td>
</tr>
<tr>
<td>4:15-4:45 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
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### Wednesday, October 22nd, 2008

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
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<tbody>
<tr>
<td>8:00-8:15 am</td>
<td>The Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:15 -8:45 am</td>
<td>Squad Meeting: Visitation Trends</td>
<td>SEOT Supt (Acting) Don Mannel</td>
</tr>
<tr>
<td>8:45- 9:45 am</td>
<td>Project Planning</td>
<td>Christy McCormick</td>
</tr>
<tr>
<td>9:45 -4:15 pm</td>
<td>Student Work on SEOT SIMULATION</td>
<td>Students</td>
</tr>
<tr>
<td>4:15 pm-4:45 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
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### Thursday, October 23rd, 2008

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<tr>
<th>Time</th>
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<tr>
<td>8:00 -8:15 am</td>
<td>The Good of the Day &amp;Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:15-10:30 am</td>
<td>Group Work on SEOT SIM</td>
<td>Students</td>
</tr>
<tr>
<td>10:30-12:30 pm</td>
<td>Cultural/Natural Resource Issues in FM</td>
<td>Russell Galipeau</td>
</tr>
<tr>
<td>12:30 pm-1:30 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:00 pm-3:00 pm</td>
<td>Informal Visitor Contact: Supporting your Employees</td>
<td>Deanne Adams</td>
</tr>
<tr>
<td>3:15 pm-4:30 pm</td>
<td>Accessibility</td>
<td>Dave Park</td>
</tr>
<tr>
<td>4:30 pm-4:45 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>6:30 pm-8:00 pm</td>
<td>Time Management: How to Prioritize Work</td>
<td>Jeri Mihalic Christy McCormick</td>
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### Friday, October 24th, 2008

<table>
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<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
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<tbody>
<tr>
<td>8:00-8:15 am</td>
<td>The Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:00 -9:00 am</td>
<td>Squad Meeting: PAMP and PAMP Execution</td>
<td>SEOT Supt (Acting) Betsy Dodson</td>
</tr>
<tr>
<td>9:00-9:30 am</td>
<td>Lecturette: Fleet ,Fuel, and Other Fixed Costs</td>
<td>Don Mannel</td>
</tr>
<tr>
<td>9:30-4:00 pm</td>
<td>Group Work on SEOT Simulation</td>
<td>Students</td>
</tr>
<tr>
<td>4:00-4:30 pm</td>
<td>Lecturette: Seasonality and Special Events</td>
<td>Jeri Mihalic</td>
</tr>
<tr>
<td>4:30 pm-4:45 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
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</table>
## Week II

### Monday, October 27\textsuperscript{nd}, 2008

<table>
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<th>Time</th>
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<tr>
<td>8:00-8:15 am</td>
<td>The Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:15-9:30 am</td>
<td>Squad Meeting: Solid Waste Reduction</td>
<td>Teresa Dickinson</td>
</tr>
<tr>
<td>9:30-11:30 am</td>
<td>Leadership Strategies and Skills-Part One</td>
<td>Steve Wolter</td>
</tr>
<tr>
<td>11:30-12:30 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:30 -2:00 pm</td>
<td>Health and Wellness</td>
<td>Peggy Buchanan</td>
</tr>
<tr>
<td>2:15-4:15 pm</td>
<td>Leadership Strategies and Skills-Part Two</td>
<td>Steve Wolter</td>
</tr>
<tr>
<td>4:15-4:45 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
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</table>

### Tuesday, October 28\textsuperscript{th}, 2008

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<td>8:00-8:15 am</td>
<td>The Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
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<tr>
<td>8:15-8:45 am</td>
<td>Squad Meeting: Cyclical Funding</td>
<td>Bill Thompson</td>
</tr>
<tr>
<td>8:45 -11:30 am</td>
<td>Writing for Impact-Part One</td>
<td>Dana Anderson</td>
</tr>
<tr>
<td>11:30-12:30 pm</td>
<td>Lunch</td>
<td></td>
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<tr>
<td>12:30 -2:30 pm</td>
<td>Writing for Impact-Part Two</td>
<td>Dana Anderson</td>
</tr>
<tr>
<td>2:30-4:30 pm</td>
<td>Sustainability Policy and Regulations</td>
<td>Shawn Norton</td>
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<tr>
<td>4:30-5:00 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>5:00- ??</td>
<td>Evening Social with Mentors</td>
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### Wednesday, October 29\textsuperscript{th}, 2008

<table>
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<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
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<tbody>
<tr>
<td>7:00 am-12:00 pm</td>
<td>Field Experience for Students</td>
<td>Jeri Mihalic, Christy McCormick</td>
</tr>
<tr>
<td>8:00 am- 12:00 pm</td>
<td>Mentor Workshop</td>
<td>Betsy Dodson, Steve Wolter</td>
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<tr>
<td>12:00 pm-1:15 pm</td>
<td>Student Lunch with Mentors</td>
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<tr>
<td>1:15 pm-1:45 pm</td>
<td>Reflective Analysis</td>
<td>Christy McCormick</td>
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<tr>
<td>2:00 pm-3:30 pm</td>
<td>Distributed Learning Session #2 Planning</td>
<td>Christy McCormick</td>
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<tr>
<td>3:30 pm-4:00 pm</td>
<td>One-Minute Paper, Instructor Evaluation</td>
<td>Course Coordinators</td>
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<tr>
<td>7:30 pm-8:30 pm</td>
<td>SEOT Presentation Dress Rehearsal</td>
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### Thursday, October 30th, 2008

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
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<tbody>
<tr>
<td>7:00 am- 8:00 am</td>
<td>Individual and Group Photos</td>
<td></td>
</tr>
<tr>
<td>8:00 am-11:30 am</td>
<td>Group SEOT Presentations</td>
<td>Evaluation Panel</td>
</tr>
<tr>
<td>11:30 am-12:30 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:30 pm-4:30 pm</td>
<td>Group SEOT Presentations</td>
<td></td>
</tr>
<tr>
<td>4:30 pm-5:00 pm</td>
<td>Course Conclusion and Evaluation</td>
<td></td>
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<tr>
<td>5:30 pm-8:30 pm</td>
<td>Group Dinner</td>
<td></td>
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</table>

### Friday, October 31st, 2008

Travel Day
THE SIMULATION

Squad Meetings
Except where noted, every morning will begin with a squad meeting. During the meeting, the Superintendent will inform students about current issues in the park or park administration, provide instruction, give students reminders or specifics on the day’s agenda, and answer questions that may have come up. Squad meetings also serve as a time for instructors to gauge student morale and stress levels to determine if the simulation’s scripted events need to be modified.

Usually, one or more of the other division chiefs will be playing some part in squad meetings. The required cast for each squad meeting will be indicated on the lesson plans under Points to Remember; however, “chiefs” are ALWAYS welcome to participate in the morning squad meetings, whether they have been scripted for that day or not.

Assignments and Final Products
Some of the assignments students receive will be due throughout these two weeks rather than requiring everything to be due at the end. These “process assignments” will help guide students through the task of analyzing and interpreting SEOT data and will be a step along the way of creating an annual work plan. Although not assessed as part of their final project, process assignments are part of their grade for AFMP. The following is a list of these process documents:
- Functional Analysis (Staffing Model)
- PMIS Project Submittal
- Annual Work Plan Project Plan
- Critical Systems Priority List

Students’ final product will be an Annual Plan which they will present to the SEOT Park Management in a 30-minute PowerPoint presentation. In addition, they will also submit:
- Annual Work Plan – electronic copy
- Briefing Statement – A summary of impacts on the budget/work plan

NOTE: Because an annual work plan has not been clearly defined, it is vital that instructors do not inadvertently mislead or confuse students who are looking for help understanding annual work plans. We must present one voice on the subject. Unless you are absolutely certain, please do not answer specific questions about student’s final products. Instead, refer students to the HelpDesk.

Role of Instructors/Facilitators
Instructor/Student Interaction
Throughout the next week and a half, students will be coming to you with questions about facility management practices, clarification and due dates on assignments, and/or requests for moral support. Although you are encouraged to stay “in-character” as much as possible when interacting with students, you should also feel free step out of character if being in-character is
placing undue strain on you or the student. Subtle hints or suggestions are appropriate so long as they do not rob students of their chance to discover something for themselves. The following are the list of roles necessary for morning squad meetings and final presentations:

Superintendent
Chief, Resource Mgmt
Chief, Administration
Chief, Interpretation
Chief, Protection

Training Sessions
In addition to these roles, you may also be leading in-sim training sessions. Although the original instructional structure of AFMP has morphed into the SEOT Simulation, many of the traditional classroom topics (e.g. Accessibility, Budgeting, Cultural/Natural Resources, etc) are still being taught, only they are being framed in-sim as on-the-job or orientation training sessions for the SEOT Facility Manager(s). This should cause almost no change to the training sessions besides the instructor/facilitator pretending that they are on “Sea Otter Island” to train the “Facility Manager.”

Lectureettes
Lecturettes will supplement the training sessions and provide students with valuable tools they will need to succeed in the simulation. These ten- to thirty-minute presentations will occur throughout the simulation and, with only a few exceptions, will also be presented as in-sim.

Role of Mentors
Most mentors will not be arriving until the second week, so it is their role to guide students as they finalize their products for the class. What is most important during these last few days is that mentors allow students to continue to discover for themselves, even if that means students make mistakes along the way.

Summary of Scripted Events
1. Sim DAY 2: Visitor Report Card results gave bad marks to the visitor center restrooms.
2. Sim DAY 4: The Superintendent has reduced the Maintenance Division budget by 1.5%
3. Sim DAY 5: Superintendent decides he wants a project for ADA compliance

Homework Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Assigned Day</th>
<th>Session</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Analysis (staffing model)</td>
<td>Tue, Oct. 21</td>
<td>Lect: Productive Hours</td>
<td>Mon, Oct. 27</td>
</tr>
<tr>
<td>PMIS Project Submittal</td>
<td>Tue, Oct. 21</td>
<td>PMIS</td>
<td>Fri, Oct. 24</td>
</tr>
<tr>
<td>Critical Systems Priority List</td>
<td>Fri, Oct. 24</td>
<td>Squad Meeting 4</td>
<td>Mon, Oct. 27</td>
</tr>
</tbody>
</table>
# TOTAL COURSE POINT BREAK-DOWN

<table>
<thead>
<tr>
<th>Activity</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>PMIS Project Submittal</td>
<td>75</td>
</tr>
<tr>
<td>Oral Presentation with PPT (200)</td>
<td>200</td>
</tr>
<tr>
<td>Project Plan: Annual Work Plan</td>
<td>75</td>
</tr>
<tr>
<td>Functional Analysis (Staffing Model)</td>
<td>50</td>
</tr>
<tr>
<td>Critical Systems Priority List</td>
<td>50</td>
</tr>
<tr>
<td>Field Trip Paper (50)</td>
<td>50</td>
</tr>
<tr>
<td>Oral Annual Work Plan (150)</td>
<td>150</td>
</tr>
<tr>
<td>Written Annual Work Plan (150)</td>
<td>150</td>
</tr>
<tr>
<td>Team Assessment (100)</td>
<td>100</td>
</tr>
<tr>
<td>Class Participation (100)</td>
<td>100</td>
</tr>
<tr>
<td>AFMP Total Points (1000)</td>
<td>1000</td>
</tr>
</tbody>
</table>
Chapter One:  
Lesson Plans
DAY ONE
MONDAY, OCTOBER 20, 2008

SESSION TITLE: Course Introduction and Welcome to the Park

INSTRUCTORS/SPEAKERS: Betsy Dodson
Woody Smeck
Dan Blackwell

SESSION LENGTH: 45 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Describe the overall goals and objectives of the course.

TRAINING AIDS:

HANDOUTS:
- AFMP Introduction and Objectives
- Course Agenda
- Welcome to the Santa Monica Mountains NRA
- Instructor Evaluation
- Syllabus and Rubric Sheets for AFMP
- Sticky Pads

FACILITATOR NOTES: This session will serve as an introduction to the Advanced Facility Management Practices course, as well as a reconvening of the students in the FMLP. Students will receive information about course goals and objectives and an overview of the following two weeks.

POINTS TO REMEMBER: During this session, emphasize that:
- The continuing success of each student requires personal commitment.
- Resource support exists for each student.
- The FMLP will continue to have rigor built into every aspect, including this course.
<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Woody Smeck</strong></td>
<td>Presentation</td>
<td>15 min.</td>
</tr>
<tr>
<td>Welcome to Santa Monica Mountains NRA</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dan Blackwell</strong></td>
<td>Presentation</td>
<td>15 min.</td>
</tr>
<tr>
<td>Welcome to Course Three of the FMLP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reconvene the Group of Students</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Reiterate that they are becoming a group of leaders for the NPS’ future.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Each step along the way takes them closer to leadership positions – are now embarking on the third of five courses in the FMLP.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Give them each a sticky pad and ask them to write one word that describes their experience so far. Ask them to take 1 minute to tell the class why that particular word sums it up</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• <strong>Before ending the session, ask the students to post their sticky note on a flip chart sheet.</strong></td>
<td>Activity</td>
<td></td>
</tr>
<tr>
<td><strong>Overview of Course Goals</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Application of concepts learned during Principles and Interim #1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Looking at management from a leadership perspective – must have leadership AND management skills, but must also have a vision for the future.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Leading a park is more than just facility management – other disciplines, staffing, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• What is expected from and hoped for the students from the leaders of the NPS’ perspective.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### CONTENT

**Betsy Dodson**

**Review course agenda.**
- Discuss facilities, lunch plans, evening plans (homework, events, evening sessions).
- Point out Simulation Overview and Rubrics
- Introduce Parking Lot Concept

### Introduction to the Course and Course Goals

Describe overall purpose and Goals of course.

Course goals: Following completion of this course, students will be able to do the following:
- Plan operations, maintenance, repair, and alterations functions by creating an Annual Work Plan
- Revise plans through evaluation to fit within budgeted funds.
- Identify and utilize human, paper, and electronic resources to guide decision-making and planning process.
- Analyze and evaluate data from multiple sources to inform planning and management decisions

### Reiterate the importance of feedback.
- Will be evaluating every day.
- Hand out Instructor Evaluation. Tell them this is to be used throughout the course.
- At end of the course, another evaluation will be distributed which focuses on the course as a whole

### METHOD | TIME
--- | ---
Presentation, PowerPoint, Handouts | 15 min.
SESSION TITLE: Student Presentations

INSTRUCTORS/SPEAKERS: Course Coordinators, Students

SESSION LENGTH: 5 hours, 15 minutes (+1 hour Lunch Break)

OBJECTIVES: At the end of this session, students should be able to:

- Describe how they applied concepts of asset management to their park and the ways in which the DLS #1 activities reinforced these concepts.
- Identify further needs in their oral communication skills.
- Outline an understanding and the outcomes of their developmental activity.
- Identify any change in behavior or skill level as a result of activities during DLS #1.
- Outline how DLS #1 activities applied to the overall park mission.

TRAINING AIDS:
- Student PowerPoints

HANDOUTS:
- Optional for students

FACILITATOR NOTES: The goals of this session are to allow the students a chance to explain what project(s) they completed during the DLS #1 period. This will build the strength of their cohort and also allow them to learn from one another’s successes and mistakes. In addition, the session should:

- Provide the students with the opportunity to practice their oral presentation skills.
- Ask the students to describe how they applied concepts of park asset management that they learned in the first course to a real-life setting.
- Learn how students’ skill sets have changed during the interim period, including a focus on the development of leadership skills.

POINTS TO REMEMBER: During this session, emphasize that each student will have ten minutes to present what they accomplished during the DLS #1 period. Approximately every hour, the course coordinators should allow for a ten minute break.

EVALUATORS:
Betsy Dodson
Jeri Mihalic
Christy McCormick
Dan Blackwell (for first half of session)
Don Mannel (second half of session)

FILMING:
Zach Carnagey
### CONTENT:

<table>
<thead>
<tr>
<th>Course Coordinators</th>
<th>Introduction to Student Oral Presentations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outline goals for oral presentations.</td>
<td></td>
</tr>
<tr>
<td>- Share what project(s) were completed during the DLS #1 and lessons learned. Allow students to learn from one another’s successes and mistakes.</td>
<td></td>
</tr>
<tr>
<td>- Provide opportunity to practice oral presentation skills.</td>
<td></td>
</tr>
<tr>
<td>- Describe how they applied concepts of asset management to a real-life setting.</td>
<td></td>
</tr>
<tr>
<td>- Outline how their skill sets have changed during DLS#1, including development of leadership skills.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FMLP Students</th>
<th>Student Oral Presentations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key: Outline how skill set has changed, including development of leadership skills.</td>
<td></td>
</tr>
<tr>
<td>- Share the project(s) they completed during DLS #1 and lessons learned. What competencies did they build?</td>
<td></td>
</tr>
<tr>
<td>- Share both successes and mistakes.</td>
<td></td>
</tr>
<tr>
<td>- Describe application of asset management concepts to your park.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presentation</td>
<td>15 min.</td>
</tr>
<tr>
<td>Student Presentations</td>
<td>5 hrs.</td>
</tr>
</tbody>
</table>
SESSION TITLE: Asset Management Update

INSTRUCTORS/SPEAKERS: Dan Blackwell and Don Mannel

SESSION LENGTH: 1 hour

OBJECTIVES: At the end of this session, students should be able to:
- Understand the updates and practices of the Asset Management Program as it applies to PFMD

TRAINING AIDS:
- PowerPoint

HANDOUTS:
- None

FACILITATOR NOTES: The goal of this session is to allow Dan Blackwell, Acting Branch Chief of Asset Management, to connect with the students and update them on current practices in WASO

POINTS TO REMEMBER:
- The students may have a number of questions. Leave time at the end of the session for discussion
## CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don Mannel and Dan Blackwell</td>
<td>Presentation, Discussion</td>
<td>60 min.</td>
</tr>
</tbody>
</table>
SESSION TITLE: Lecturette 1: Unplanned Work

INSTRUCTORS/SPEAKERS: Don Mannel

SESSION LENGTH: 15 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Recognize how budgets must include some flexibility to address unforeseen events.
- Predict how much of a budget should be set aside for unplanned events
- Prioritize critical work versus non-critical work

TRAINING AIDS: None

HANDOUTS: None

FACILITATOR NOTES: This session serves the following purposes:
- All lecturettes have an overall purpose in that they should engender some thought and discussion
- All lecturettes should also play some part in the SEOT Simulation.

POINTS TO REMEMBER:
- Provide instructor perspective on how much of a budget should be set aside for unplanned events at park
- Provide instructor perspective on critical vs. non-critical work at park

NOTE: The SEOT simulation has not yet been introduced to the students and this is a very important concept in their Annual Work Planning. Without talking specifically about the simulation, reiterate the importance of this concept in developing an Annual Work Plan
INTRODUCTION:

Course Coordinator

Unfortunately, no matter how well we plan, unplanned work is an unavoidable reality in the facility management field. To give you a better idea how you can deal with this, Don Mannel, who has been Chief of Maintenance at Golden Gate NRA for the past 12 years, will give you some suggestions on how he copes with this problem.

CONTENT:

<table>
<thead>
<tr>
<th>Don Mannel</th>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unplanned Work</td>
<td>At my park, we plan ___% for unplanned work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>At my park, determination of critical vs. non-critical work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>How does your park budget for unplanned work?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lecture/Discussion</td>
<td>15 min.</td>
</tr>
</tbody>
</table>


SESSION TITLE: One-Minute Paper and Instructor Evaluation

INSTRUCTORS/SPEAKERS: Christy McCormick

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand their evening homework assignments.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluation (Dan Blackwell, Don Mannel)

FACILITATOR NOTES: This session serves the following purposes:
- Helps learners to reflect on and reinforce information from the first objective
- Provides the chance to clarify information, ensure objectives are being met, and shape future session content if necessary
- Allows instructors to informally evaluate students’ learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework due the next day.
**Advanced Facility Management Practices – Instructor Manual**

**August 2008**

| CONTENT: |
|---------------------------------|-----------|-----------|
| **Christy McCormick**            |           |           |
| **Team Member Assessment**       |           |           |
| • Explain that 10% of grades for AFMP will be team members assessing each other |
| • Remind students to think about this as they work together over the course |
| • Assessments will be completed after final presentations |

<table>
<thead>
<tr>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Member Assessment Handout</td>
<td>5 min.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>One-Minute Paper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduce activity and purpose. Give one minute to jot down ideas about:</td>
</tr>
<tr>
<td>• Most important information from the day?</td>
</tr>
<tr>
<td>• Unclear information?</td>
</tr>
<tr>
<td>• What else do you most need to learn?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Handout</th>
<th>10 min.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Group Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ask for responses – Spend most time on question’s 2 &amp; 3.</td>
</tr>
<tr>
<td>• Clarify the unclear; write key answers (esp. to question’s 2 and 3) on flipchart to refer to throughout the course</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discussion</th>
<th>15 min.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Review Course Objectives, Homework, and What to Expect</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Review course content accomplished.</td>
</tr>
<tr>
<td>• Review what objectives will be met tomorrow.</td>
</tr>
<tr>
<td>• Review all homework tasks.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Presentation/Discussion</th>
<th>5 min.</th>
</tr>
</thead>
</table>
DAY TWO
TUESDAY, OCTOBER 21, 2008

SESSION TITLE: One-minute paper review & Announcements

INSTRUCTOR/SPEAKER: Betsy Dodson

TRAINING AIDS:
- Flip Charts with Team Names

HANDOUTS:
- SEOT Resource Kits with Electronic Resource Kit

FACILITATOR NOTES/DIRECTIONS:
- As students walk in the door, congratulate them and give Acceptance Letter
- Form students into their teams at the beginning of the session

**Zuma**
1. Danny Basch
2. Alan Dinehart
3. Nancy Pearson

**Mulholland**
1. Fred Euganeo
2. Aaron Dowe
3. Daryl McLeod

**Trancas**
1. Mark Colburn
2. Wayne Boyd
3. Ron Morse

**Cheeseboro**
1. Kevin Crisler
2. Glen Fickbohm
3. Cary Huffman

**Solstice**
1. Mark Denker
2. Kirsten Hardin
3. Alan Schobom

**Satwiwa**
1. Kirk Desermia
2. Shawn Harris
3. Brad Shattuck

POINTS TO REMEMBER:
- Provide students with the opportunity to clarify any aspects of previous day that were unclear, as per one-minute paper.

ANNOUNCEMENTS
- Review daily agenda
- There will be some days this week where you will be working in group all day, and lunch is not officially in the agenda, such as tomorrow (Wednesday) and Friday the 24th
SESSION TITLE: Squad Meeting – Day 1: Introduction to Sea Otter Island

INSTRUCTORS/SPEAKERS: SEOT Superintendent-via Video conference

SESSION LENGTH: 1 hour, 15 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Review the General Management Plan (GMP), unigrid, and website for information for SEOT.
- List the players and their corresponding roles in the simulation.
- Locate the Help Desk and describe the services the Help Desk can provide.
- Explain the purpose and significance of an annual report.
- Understand how to find SEOT data and begin describing the problem or exercise on which they will be working.

TRAINING AIDS:
- Video Conference Equipment
- SEOT Resource Kit
- PPT and Flipchart with SEOT Team Members

HANDOUTS:
- Annual Plan Slider Sketch

FACILITATOR NOTES: This session will serve as an introduction to the SEOT Simulation. It will give students an overview of the island, introduce the main players in the simulation, and outline what students will be expected to accomplish in the simulation. Specifically, this session will:
- Identify the purpose and need of an annual work plan.
- Identify the issues that the student groups will need to take into account when developing their SEOT Annual Work Plan (i.e. other disciplines, human resources, asset prioritization, disposal candidates, bundling work orders, etc.).
- Highlight what will be required of each student group by the end of the next week in terms of their group presentations, and what will need to be turned in for review.
- Identify where students can go for help ("HelpDesk," other individuals present during their work sessions).

POINTS TO REMEMBER: During this session, emphasize that:
- Since this is the students’ first introduction to this simulation, thoroughly explain the requirements for the students in terms of the presentation and documentation.
- There is no template for annual reports, nor a list of what must be included in it; the students are trailblazers in the field and have a great deal of license.
- Their annual reports must be based on data. All planning decisions should have a clear answer “why?”
- We will be using FMSS 4.2 for all assignments and terminology.
• **Cast:**
  - Supt. – Steve Wolter
  - Acting Supt. – Don Mannel
  - Chief of Admin – Jeri Mihalic
  - Chief of Interp – Zach Carnagey
  - Chief of Resource Mgmt – Betsy Dodson
  - Chief of Protection – Amy Gregor
<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SEOT Superintendent</strong></td>
<td>Video</td>
<td></td>
</tr>
<tr>
<td><em>Steve Wolter</em></td>
<td>Conference</td>
<td>15 min.</td>
</tr>
<tr>
<td><strong>Introduction to SEOT</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Introduce Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Brief overview of SEOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Your task</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SEOT Superintendent (Acting)</strong></td>
<td>Lecture</td>
<td>30 min.</td>
</tr>
<tr>
<td><em>Don Mannel</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Review documents for SEOT with students</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Provide Resource Kits and allow students</td>
<td></td>
<td></td>
</tr>
<tr>
<td>time to look them over</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HelpDesk</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Briefly describe</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Annual Work Plans</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Purpose and significance. “I’m going to</td>
<td></td>
<td></td>
</tr>
<tr>
<td>tell you the need, so you create something</td>
<td></td>
<td></td>
</tr>
<tr>
<td>that addresses that need.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Provide Annual Plan Slider handout.</td>
<td></td>
<td></td>
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<tr>
<td>• Explain the issues / tasks they must</td>
<td></td>
<td></td>
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<tr>
<td>accomplish in their small groups, as</td>
<td></td>
<td></td>
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<tr>
<td>well as schedule, how much time they</td>
<td></td>
<td></td>
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<tr>
<td>will have to work on group presentation</td>
<td></td>
<td></td>
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<tr>
<td>information.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Presentation Requirements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Time length and expectations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Discussion</strong></td>
<td>Discussion</td>
<td>30 min.</td>
</tr>
<tr>
<td>**Clarify assignment and answer student</td>
<td></td>
<td></td>
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<tr>
<td>questions**</td>
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</tr>
</tbody>
</table>
ACTING SUPERINTENDENT WELCOME SPEECH

As Steve said, my name is Don Mannel and I will be acting supt. for the next week. Steve had mentioned that he wanted an annual work plan for your division, and we’ll talk about that in just a second. However, what I’d like to do first is provide you with some reports to get you up to speed with SEOT.

Before you read anything, please make sure that you have each of the following items.

1. Welcome Memo
2. GMP
3. SEOT Website
4. PAMP
5. Optimizer
6. Unigrid
7. EMS
8. HMP
9. EO 13423
10. 2009 Calendar
11. 2008-2010 Calendar

(give students 5-10 minutes to look over their material)

HelpDesk

We recognize that jumping into a new situation like this is very difficult, so we’ve put these technical assistants at your disposal there at the help desk. Those people are there for you, so use them.

You may have come from a park that has upgraded to FMSS 6.2, but we aren’t scheduled for the upgrade until June 2009, so we ask that you revert back to FMSS 4.1 both in your data review as well as any terminology you use in your presentation and documentation. Our managers are just beginning to understand FMSS and we don’t want to add any confusion.

Annual Work Plans

Supt. Wolter mentioned that he wanted you to present an Annual Work Plan for your division to him and the park admin on Thursday next week. So, besides training, and getting oriented with the park, that’s what you should spend your time on.

You probably want to know what an Annual Work Plan is. Well, the answer is, we don’t know exactly. We know what we need it to do and what it will incorporate, but exactly what it looks like…that’s up to you. The exciting part about this is that you are on the cutting edge of Facility Management for the NPS—what you create here could become standard practice.
Before he left, Steve gave me this [pass out Annual Work Plan Slider]. It is a little concept map and sketch that he made for his vision of an Annual Work Plan. I'll give you a couple minutes to look at it. [wait 3 minutes].

The way I see it, an Annual Work Plan deals with four things: fusion, communication, efficiency, and accountability.

First is Fusion. The sketch on the bottom is kind of a visual representation of how an annual work plan relates to some of the other planning documents. Think of it as a transparent slider where you can view how the EMS, PAMP, GMP, and 5-year Projects impacts your work for a year. These different planning documents are so broad and deal with such long periods of time that it’s impossible to think about them all simultaneously; an annual work plan brings them all together and fuses them into a form where we can see the steps of those plans in action. So that's one aspect of the plan, fusion.

The Annual Work Plan is also a communication device for park admin. If we find out at the end of the year that regional has extra funds, I want to be able to know what we could spend it on. If a tsunami comes and wipes out West Campground, I want to know how that’s going to affect operations around the rest of the park. Changes occur all the time, and we can’t make good decisions without information. If your supt. throws a pebble in the water, there’s going to be ripples. He’s going to want to know what those ripples are going to be. Your annual work plan should be able to supply that information from the Maint. Division.

Then there’s efficiency. We’re not a business; we’re not here to make money. So efficiency isn't about saving money to put in our pockets, it’s about getting more done. This work plan should be a tool that will help you see where your budget is being spent and what you can cut back on and what you maybe need to ramp up. There’s not much use in cleaning a campground once a day that no one uses when the grounds around the light house are so overgrown that people can’t access it. This first draft plan will give you your baseline, so you’ll be able to fine tune work over the next few years to more efficiently use the funds you’ve got.

And finally, there’s accountability. I’m not going to lie to you chief, considering the size of your budget, a lot of people see the Maint. Div as the fatted cow in parks. So when questions come up as they sometimes do, it would be nice if we had clear answers as to how that money is being spent and will be spent.

So, that’s what we want this plan to be able to do: fuse other planning documents together into a useable form; communicate with park admin; improve efficiency; and increase accountability. Again, how you chose to do this, the FORM of this plan, is up to you. Maybe you want to use a Word document, a spreadsheet, a calendar, we don’t know. That’s your job. Do whatever makes the most sense.

**Presentations**

[pass out Presentation Guidelines handout]

Now, on next Thursday when you present your Annual Work Plan to the Supt. and division chiefs, Supt. Wolter wanted something a little more specific. Because Steve is very detailed about presentations, we’ve created this guideline sheet to help new hires.
First, this will be a 30-minute presentation. Wolter is big on PowerPoint, so you have to have a PowerPoint with your presentation with between 7 and 12 slides. Seriously, do not make more than 12 slides. Your presentation is going to be uninterrupted, so be prepared to answer questions about your plan for fifteen minutes after the presentation. I've worked with some of these people before, so be prepared to defend your decisions during the question and answer period, and have ready documentation to back yourself up.

Besides the presentation, Supt. Wolter also wanted a copy of your work plan which has to be electronic since we are trying to reduce our paper consumption. Along with this you'll also provide a briefing statement that gives an overview of your Annual Work Plan and any changes that you've made to it along the way.

Those are the final products that you will need to have ready on Thursday: 1) a 30-minute presentation, with between 7 and 12 PowerPoint slides, that describes your annual work plan; 2) A copy of your annual work plan; and 3) a briefing statement.

Just to give you a heads up, you'll also have some smaller documents that we'll ask you to prepare during the week, but these should help you with your plan. You'll get more details about these later.

Now, you probably have a lot questions about Annual Work Plans, your presentation, or your plan and briefing statement submission. Ask away.
Presentation Guidelines

1. Presentations should be 30-minutes in length.
   a. When more than one person is speaking, time should be evenly distributed to each person (e.g. if two people, each would speak for 15 minutes; if three, for 10 minutes; etc)

2. PowerPoint should accompany Presentations
   a. Rule-of-thumb is one slide for every three minutes
   b. A 30-minute presentation should have between 7 and 12 slides, NO MORE.

3. Relevant handouts (in addition to a Briefing Statement) that enhance understanding are encouraged.

4. Presenters should have ready documentation for questions that might arise after presentations

5. Consider your audience
   a. Assume that your audience has a basic understanding of facility management, the PAMP, etc. High level facility management concepts and vocabulary might need to be explained.
SESSION TITLE: Discussion of Scientific Method and Data Analysis Tools

INSTRUCTORS/SPEAKERS: Zach Carnagey, Steve Homan

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:
- Understand the role and importance of the scientific process and data-driven decision making
- Perform basic spreadsheet tasks in Excel
- Use pivot tables in Excel to maneuver through more advanced data to support Annual Work Plan development

TRAINING AIDS:
- CDs with Excel Spreadsheets on them
- M &Ms

HANDOUTS:
- Basic Excel Navigation and Use (Student Workbook)
- Student Practice Activity Question Sheet (Student Workbook)
- Filtering and Pivot Tables

FACILITATOR NOTES: The flow of the session should be as follows:
- The technique should be as follows: Teacher Demonstrate → Teacher Lead/Student Follow → Student Lead/Teacher Follow → Individual Work
- Sample data not related to FMP is used so students are not caught up in discipline related data

POINTS TO REMEMBER:
- In-Simulation
- Ensure that there are instructors in the back of the room to observe, assist, and help train students as they use the tools
- Assume that all candidates are at the introductory level
- Ensure all laptops are closed during the Teacher Demonstrate portion
INTRODUCTION:
Don Mannel (Acting Supt)
One of the most important tools in modern facility management is spreadsheet programs, such as Microsoft Excel. But in order to know what you want the spreadsheet to do with your data, you have to go through some scientific process and data analysis. Therefore, to give you some of these tools, Zach Carnagey and Steve Homan are here to help hone your skills with data analysis and using Excel. Zach is a former researcher who now works as a freelance problem-solving consultant, and Steve Homan has been working in facility management in the private sector for more than 10 years. Hopefully, this session will help you start getting a handle on SEOT data and what you can learn from it.

CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zach Carnagey</td>
<td>Activity and Lecture</td>
<td>25 min.</td>
</tr>
<tr>
<td><strong>Discussion of Scientific Process and Data Analysis</strong></td>
<td></td>
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<tr>
<td>• Gathering Data</td>
<td></td>
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<td>• Organizing Data</td>
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<tr>
<td>• Analyzing Data</td>
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<tr>
<td><strong>Scientific Method M &amp; M Activity</strong></td>
<td></td>
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</tr>
<tr>
<td>• Divide Students into their SEOT groups</td>
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<td></td>
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<tr>
<td>• Each student gets a bag of M &amp; Ms. Instruct NOT TO OPEN</td>
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<tr>
<td>• As a group, prepare two hypotheses- How many and what color</td>
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<tr>
<td>• Collect Data</td>
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<tr>
<td>• Report Findings</td>
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<tr>
<td>Tie this concept to how your might forecast unplanned work</td>
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</tr>
<tr>
<td>Steve Homan</td>
<td>Lecture</td>
<td>5 min.</td>
</tr>
<tr>
<td><strong>Excel Workshop</strong></td>
<td></td>
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<tr>
<td>Introduction to spreadsheets and their use.</td>
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<td>CONTENT</td>
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<tr>
<td><strong>Microsoft Excel: The Basics</strong></td>
<td>Teacher Demonstrate, Student Follow</td>
<td>50 min</td>
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<tr>
<td>Teacher demonstrates each section and then students follow</td>
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<tr>
<td>• Basic terminology</td>
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<tr>
<td>• Entering and Editing Data</td>
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<tr>
<td>• Automatic Features</td>
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<tr>
<td>• Using Functions</td>
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<tr>
<td>• Calculating Percent and Absolute Cell References</td>
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<tr>
<td>• Standard Toolbar</td>
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<td>• Formatting Toolbar</td>
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<tr>
<td>• Drawing Toolbar</td>
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<tr>
<td>• Inserting and Deleting Rows in a Data Set</td>
<td></td>
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<tr>
<td><strong>Sorting, Filtering, and Pivot Tables</strong></td>
<td>Teacher Demonstrate</td>
<td>15 min</td>
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<tr>
<td>Introduction to Sorting</td>
<td>Teacher Lead, Student Follow</td>
<td>15 min</td>
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<tr>
<td>Introduction to Filtering</td>
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<tr>
<td>Introduction to Pivot Tables</td>
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<tr>
<td>Student practice of above</td>
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<tr>
<td><strong>Linking Spreadsheets</strong></td>
<td>Teacher Demonstrate</td>
<td>10 min</td>
</tr>
<tr>
<td>Copy and Paste</td>
<td>Teacher Lead, Student Follow</td>
<td>10 min</td>
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<tr>
<td>Student Practice of above</td>
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<tr>
<td><strong>Student Practice Activity</strong></td>
<td>Activity, UPDE Spreadsheet</td>
<td>20 min</td>
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<tr>
<td>Hand out worksheet paper with the following questions:</td>
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<tr>
<td>1. How would you sort by…?</td>
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<tr>
<td>2. How would you filter by…?</td>
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<tr>
<td>3. How would you find the average…?</td>
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<tr>
<td>4. How would you determine a total?</td>
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</tbody>
</table>
SESSION TITLE: Work Types and Their Importance in developing an Annual Work Plan

INSTRUCTORS/SPEAKERS: Jeri Mihalic, Betsy Dodson

SESSION LENGTH: 1 hour, 15 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Describe the QA/QC process as it applies to the Annual Work Plan
- Correctly identify examples of work types and sub-work types

TRAINING AIDS:
- County Fair Answer sheet
- Flipcharts with work type and sub-type headers
- Sticky notes with work activities

HANDOUTS:
- County Fair Answer sheet
- Work type and sub-type definition sheet

FACILITATOR NOTES:

The work types and sub-work types should be the main focus of the session, but the session should be introduced by talking about data accuracy in general. Open ended questioning should be used to assess students understanding of QA/QC and reinforce what has been learned in the e-course. As you use the assessment technique, ensure that all students participate as much as possible.
### Quality Assurance/Quality Control

#### Importance of the QA/QC process
- Critical first step of the PAMP process
- Not only useful for the PAMP, but a good business practice (e.g., converting to FMSS 6.2)
- Reinforce content from the e-course by asking questions to the class
  - What is QA/QC?
  - Why bother with QA/QC?
  - What reports are useful for QA/QC (record on flipchart)

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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<tbody>
<tr>
<td>Jeri Mihalic</td>
<td>Lecture-class</td>
<td>15 min.</td>
</tr>
<tr>
<td>Quality Assurance/Quality Control</td>
<td>discussion</td>
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<td></td>
<td>Flipchart</td>
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</table>

### Work Types and Sub-Work Types
- Definitions of all (use FM glossary for most)
- Determining the correct work-type using a decision tree

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<tbody>
<tr>
<td>Lecture</td>
<td>20 min.</td>
</tr>
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</table>

### Student Exercise: Work Type County Fair
- Reiterate importance of correct classification of work types and implications of incorrect classifications.
- Why are work types important? Why do we have problems classifying work types in the field?
- Explain handout – Work and Sub-Work Type Definitions
- Describe what they will be doing – Flip chart sheets with different work activities. Students will have 3-4 post-it notes with a separate work activity on each (i.e. paint the building, re-stripe the parking lot, etc.) They will find the appropriate flip chart and stick their work activity under the appropriate work/sub-work type. Once they are done, have them regroup.
- Ask them about their experiences with work type classification, any confusing areas, etc.

<table>
<thead>
<tr>
<th>METHOD</th>
<th>TIME</th>
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<tbody>
<tr>
<td>Activity, Debrief</td>
<td>40 min.</td>
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</table>
WORK AND SUB-WORK TYPE DEFINITIONS

Work Types

*Facility Maintenance*
Day-to-day activities as well as the planned work required to preserve an asset in such a condition that it may be used for its designated purpose over its expected life cycle. Examples include routine replacement of HVAC filters, repairing a roof that was damaged in a storm, and building a ramp to meet accessibility laws.

*Facilities Operations*
Work activities performed on a recurring basis related to an asset's normal performance or function throughout the year which intends to meet routine, daily park operational needs and activities related to the normal performance of the functions for which a facility or item of Installed Building equipment (IBE) is intended to be used. Typical work performed under operations includes janitorial and custodial services, snow removal, purchase of utilities (water, sewer, electricity), grounds keeping, custodial services, and waste management, etc.

*Capital Improvements*
Alterations or new construction that helps an asset better meet its intended purpose. Examples include paving an unpaved parking area and replacing portable restrooms with a permanent facility in a frequently visited area.

Sub Work Types

*Facility Maintenance (FM)*

**FM – PM** (Preventive Maintenance)
Regularly scheduled periodic maintenance activities (within 1 year) on selected equipment.

**FM – CM** (Corrective Maintenance)
Unscheduled reactive repairs that would not be estimated and planned, but are accomplished by local staff or existing service contractors.

**FM-CR** (Component Renewal)
The planned replacement of a component or system that will reach the end of its useful life based on condition and life cycle analysis within the facility's lifetime.

**FM-EM** (Emergency Maintenance)
A maintenance task carried out to avert an immediate hazard, or to correct an unexpected failure.
**FM – IPH** (Immediate Personal Hazard)
A facility deficiency that poses a threat to human health and safety and requires immediate action.

**FM – DM** (Deferred Maintenance)
Maintenance that was not performed when it should have been, or was scheduled and was put off or delayed. Continued deferment of maintenance will result in deficiencies.

**FM – LMAC** (Legis. Mandate Accessibility)
Deficiencies that must be corrected in response to regulatory requirements. These activities include retrofitting for accessibility.

**FM – LMCO** (Legis. Mandate Code compliance)
Deficiencies that must be corrected in response to regulatory requirements. These activities include retrofitting for code compliance and removing hazardous materials.

**FM – LMFS** (Legis. Mandate Fire/Structure)
Deficiencies that must be corrected in response to regulatory requirements related to structural fire protection codes.

**FM – LMLS** (Legis. Mandate Life/Safety Code)
Deficiencies that must be corrected in due to regulatory requirements related to safety codes.

**FM – CRDM** (Component Renewal, Deferred Maintenance)
A component renewal work type that has been tracked in the system and facility management practice and is not funded when identified as Deferred Maintenance will then move into the Component Renewal Deferred Maintenance work type category.

**FM – RMDM** (Recurring Maintenance, Deferred Maintenance)
Recurring maintenance that has been identified and tracked in the system and facility management practices and is not funded when required will move into this work category.

**Facility Operations (FO)**

**FO – AD** (Activate and Deactivate)
Typically seasonal driven opening and closing of an asset for operation. Weatherizing or securing asset systems prior to the closed period and start-up and testing of asset systems to begin the opening period.

**FO – CU** (Custodial)
Standard custodial tasks performed at various frequencies (daily, weekly, monthly, etc.) for functional spaces within a given asset. Sweeping, mopping, trash collection, restroom cleaning, etc.

**FO – GC (Grounds Care)**
TBD by Maintained Landscape Work Group

**FO – PS (Operate Plant/ System)**
Periodic tasks that require a specialized full-time equivalent (FTE) such as testing and monitoring of a waste treatment plant.

**FO – PC (Pest Control)**
Period actions that eliminate or protect facilities from pests which encompasses insects, rodents, nematodes, fungi, weeds, and other forms of terrestrial or aquatic plant or animal life or virus, bacteria or other form of micro-organism.

**FO – RC (Refuse Collection)**
Refuse/recycling collection begins after refuse has been collected from individual rooms and placed in an intermediate container-Includes the emptying of the intermediate container into a dumpster and emptying the dumpster at an approved landfill or transfer station.

**FO – SN (Snow/Sand/Debris)**
Activities performed to ensure safety from unanticipated hazards or obstructions. Removal or precautions applied to roads, parking, trails, roofs, beaches, waterways, and sidewalks.

**FO – UT (Utilities Cost)**
Services and commodities used to operate facilities that are delivered by pipeline or other line.
-Sewer, water, electrical, natural gas, and propane. Includes energy, water or wastewater that is generated or treated onsite, purchased from a municipal system, or from a private supplier.

**FO – BU (Business)**
Activities not directly associated with a constructed asset that pertain to the labor hours and leave of park employees.-Annual leave, sick leave, compensatory time taken, holiday, admin leave, LWOP regular, AWOL, non-duty career seasonal and furlough, suspension hours, FECA Cop, FECA Worker’s Compensation DOL, used time-Off award, sick/annual leave advance

**FO – MG (Management)**
Activities not directly associated with a constructed asset that pertain to the overall management and administration of the park.-Communications, shop management and control, shop inventory management and control, meetings, training, reports, FMSS, supervision, planning, field investigation or quality checks, budget, payroll, personnel, office administration, partnership
Capital Improvement (CI)

CI - AL (Alterations)
Changes to interior arrangements or other physical characteristics of an existing facility or installed equipment so it can be used more effectively for its currently designated purpose or adapted to a new use. Includes work referred to as improvement, conversion, remodeling, and modernization.

CI - NC (New Construction)
Construction that adds to the existing footprint of an asset, or creates a new asset.

----------------------------------- Key -----------------------------------
CI = Capital Improvement
CI-AL = Alterations
FM = Facility Maintenance
FM-CM = Corrective Maintenance
FM-CR = Component Renewal
FM-CRDM = Component Renewal, Deferred Maintenance
FM-DM = Deferred Maintenance
FM-EM = Emergency Maintenance
FM-IPH = Immediate Personnel Hazard
FM-LMAC = Legis. Mandate Accessibility
FM-LMCO = Legis. Mandate Code Compliance
FM-LMFS = Legis. Mandate Fire/Structure
FM-LMLS = Legis. Mandate Life/Safety Code
FM-PM = Preventive Maintenance
FM-RM = Recurring Maintenance, Deferred Maintenance
FM-RMDM = Recurring Maintenance, Deferred Maintenance
FO = Facility Operations
   FO – AD = Activate and Deactivate
   FO – CU = Custodial
   FO – GC = Grounds Care
   FO – PS = Operate Plant/ System
   FO – PC = Pest Control
   FO – RC = Refuse Collection
   FO – SN = Snow/Sand/Debris
   FO – UC = Utilities Cost
   FO – BU = Business
   FO – MG = Management
Student Exercise – Work Type County Fair
Flow of Activity

1. Flipcharts will be placed around the room that include different work types and sub-types. For example:

   FM – DEM                FO-UT

2. The students will walk around with sticky notes that include various work activities and stick them on the flip charts that they believe reflects the correct work type and sub-work type. This will take approximately 15 minutes.

3. Debrief
   a. Instructors will move to each flip chart and review the students’ decisions and clarify in group discussion
   b. Discussion points:
      i. Other work type activities to include on the chart?
      ii. Grey area work type activities?
THE WORK TYPE COUNTY FAIR ANSWER KEY

1. Emptying trash cans in the comfort station = FO-CU
2. Vehicle and vessel routine servicing = FM-PM
3. Reglaze windows on historic structure = FM-RM
4. Re-paving roads = FM-CR
5. Snow and ice removal = FO-SN
6. Barricading off downed power lines = FM-IPH
7. Repair park signs damaged by vandalism = FM-CM
8. Remove tree dangling over house after a winter storm = FM-EM
9. Convert historic barn into offices for park interpretive staff = CI-AL
10. Patch potholes in main park road (has not been done for 5 years due to lack of funding) = FM-RMDM
11. Replace door with appropriate size door to fit a wheelchair = FM-LMAC
12. Mowing = FO-GC
13. Plant bulbs on an annual basis = FM-RM
14. Replace broken window at entrance station = FM-CM
15. Build a loop with 12 sites in the campground = CI-NC
16. Replace a roof that is 5 years past its design life = FM-CRDM
17. Refinish wood floors in 4 residences = FM-RM
18. Litter pickup around the Visitor Center = FO-GC
19. Inspect fire hydrants = FM-PM
20. Replace park computers = FM-CR
21. Repair of deficiencies identified during an annual asset inspection = FM-DM
22. Prepare for seasonal trail closing = FO-AD
23. Immediate repairs to a blow out of a major water line = FM-EM
24. Build new visitor center at park headquarters = CI-NC
25. Winterize various fountains = FO-AD
26. Service HVAC systems = FM-PM
27. Make temporary repairs to road washed out in storm = FM-EM
28. Seasonal cleaning of gutters = FM-PM
29. Repair woodpecker holes to building siding = FM-CM
30. Replace missing handrail at Cliff Edge Overlook = FM-CM
31. Replace park boundary fence (at the end of its estimated design life) = FM-CR
32. Move sink to appropriate height in ADA-designated housing unit = FM-LMAC
33. Add a new wing to the old visitor center = CI-NC
34. Semi-annual grading of unpaved roads = FM-PM
35. Repair stucco walls on historic church biannually = FM-RM
36. Repair flat tire on law enforcement vehicle = FM-CM
37. Replace boat engine = FM-CR
38. Initiate rodent control = FO-PC
39. Immediate repairs to broken residential water line = FM-EM
40. Feed and water stock animals = FM-PM
41. Professionally steam clean carpet (every 1-5 years) = FM-RM
42. Repair park boundary fence after cattle break through it = FM-CM
43. Replace carpet that is beyond its design life and has not received proper funding = FM-CRDM
44. Repair park signs (on an annual basis) = FM-RM
45. Attend a training session on supervision = FO-MG
46. Repair hole in roof due to hurricane = FM-EM
47. Replace roof on park building at the end of its estimated design life = FM-CR
48. Change oil on fleet vehicles = FM-PM
49. Prune shrubs and trees around visitor center = FM-RM
50. Paint the exterior of a park building = FM-RM
51. Inspect and maintain generators = FM-PM
52. Replace siding on entrance station building = FM-CR
53. Repair cracks in plaster on walls and ceiling = FM-CM
54. Carcass Removal-FO- SN
55. Monitor Water Quality = FO-PS
56. Track Annual Leave Taken = FO-BU
57. Supervise a PMIS project by a permanent employee = FO-MG
58. Enter FMSS actuals and also do the payroll = FO-MG
59. Empty dumpsters and drive to the landfill = FO-RC
60. Treat building for termites = FO-PC

Key
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CI-NC = New Construction
FM = Facility Maintenance

FM-CM = Corrective Maintenance
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FO – PC = Pest Control
FO – RC = Refuse Collection
FO – SN= Snow/Sand/Debris
FO – UT= Utilities Cost
FO – BU = Business
FO – MG = Management
SESSION TITLE: Lecturette 2: Productive Hours of your Workforce

INSTRUCTORS/SPEAKERS: Dan Blackwell

SESSION LENGTH: 15 Minutes

OBJECTIVES: At the end of this session, students should be able to:
- Estimate productive hours of their labor force
- Identify impacts of labor utilization on long-term planning

TRAINING AIDS:
- (Last year’s data from 2008 Budget)

HANDOUTS:
- Organizational chart
- PORE Example of Position Management Plan

FACILITATOR NOTES: The flow of the session should be as follows:
- Use PORE Functional Analysis document as reference for homework.

POINTS TO REMEMBER:
- In-Simulation
- To Be Completed as a Team
- Homework: Functional Analysis (staffing model), Due: Monday morning. Homework Instructions:

In a five to eight page, single-spaced paper (1 inch margins, Arial 12 font) analyze the current staff at your park, as well as labor reporting for the last year. In your analysis, as a narrative (not bulleted points), answer the following questions:
1. Do the skills in your workforce meet the existing needs of the park?
2. If not, what recommendations might you make for the addition of new staff?
3. If additional staff positions were not possible, how would you address current unmet needs of the park?
**Introduction:**
Although we know how many productive work hours there are supposed to be in a given year, the reality rarely matches up. Dan Blackwell from SEKI is here to talk to you about his experiences with this at SEKI, and how you might be able to plan for this in the future.

**CONTENT:**

<table>
<thead>
<tr>
<th>Content</th>
<th>Method</th>
<th>Time</th>
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<tbody>
<tr>
<td><strong>Dan Blackwell</strong>&lt;br&gt;- SEKI- Analysis of crafts and actual needs for the park&lt;br&gt;- SEKI- How many hours are actually “productive” in reality?</td>
<td>Lecture</td>
<td>5 min</td>
</tr>
<tr>
<td><strong>Dan Blackwell</strong>&lt;br&gt;- SEOT- In reviewing SEOTs org chart and accompanying data, what questions do you have?</td>
<td>Class Discussion</td>
<td>5 min</td>
</tr>
<tr>
<td><strong>Dan Blackwell</strong>&lt;br&gt;- Introduce Homework</td>
<td>Lecture</td>
<td>5 min</td>
</tr>
</tbody>
</table>
SESSION TITLE: Project Management Information System

INSTRUCTORS/SPEAKERS: Sherry Plowman

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:
- Generate a project request based on provided criteria

TRAINING AIDS:

HANDOUTS:
- Bundled Work Orders for Water/Wastewater
- Funding Guidance for PMIS projects

FACILITATOR NOTES: The flow of the session should be as follows:
- The first hour should be spent reviewing Funding sources, DOI scoring criteria, Regional Approval, how it relates to the PAMP, FMSS, Work Orders.
- Be sure to mention ADA project as a possible PMIS project
- The second hour should be spent allowing the students to work in their teams and begin to develop their PMIS projects in their SEOT Teams. During this second hour, the Help Desk and Instructor Team should be available to assist as needed

POINTS TO REMEMBER:
- The students have already taken the PMIS e-courses, so this should not be a training session on how PMIS works, but rather a workshop that addresses the change in thinking about the following:
  - Chasing Fund sources
  - DOI Criteria
  - The Project Scoping Tool
INTRODUCTION:
A significant amount of funding can be received if you can properly write up projects in the Project Management Information System. Sherry Plowman from the Intermountain Regional Office and is an expert in PMIS. She’ll be helping you get started on a much needed PMIS project for SEOT.

CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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</thead>
<tbody>
<tr>
<td>Sherry Plowman</td>
<td>Lecture</td>
<td>20 min</td>
</tr>
<tr>
<td>- Brief Introduction to the Project Management</td>
<td></td>
<td></td>
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<tr>
<td>Information System</td>
<td></td>
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<tr>
<td>- Discussion of Project Scoping Tool (Project Bridge)</td>
<td></td>
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<tr>
<td>- DOI Ranking</td>
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<tr>
<td>- Approval Process from the Park Up</td>
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<tr>
<td>Class Discussion</td>
<td>Class</td>
<td>10 min</td>
</tr>
<tr>
<td>- How many have written PMIS Projects?</td>
<td>Discussion</td>
<td></td>
</tr>
<tr>
<td>- Successes and Lessons Learned</td>
<td></td>
<td></td>
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<tr>
<td>Class Activity</td>
<td>Class</td>
<td>45 min</td>
</tr>
<tr>
<td>- Break into SEOT Teams</td>
<td>Activity</td>
<td></td>
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<tr>
<td>- Begin to draft PMIS project for Water/Wastewater</td>
<td></td>
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<tr>
<td>project at SEOT</td>
<td></td>
<td></td>
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<tr>
<td>Debrief</td>
<td>Class</td>
<td>15 min</td>
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<tr>
<td></td>
<td>Discussion</td>
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</tbody>
</table>

DEBRIEF POINTS
- Ask if there are any questions or comments regarding this activity.
- Highlight the following key points:
  - Tell the Students they have until Friday morning to turn in the final PMIS Project.
  - Emphasize the facility manager’s role in the development of facility related PMIS projects
  - Ask the students how this would fit with the development of an annual work plan
SESSION TITLE: One-Minute Paper and Instructor Evaluation

INSTRUCTORS/SPEAKERS: Course Coordinators

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day's sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluations for
  - Sherry Plowman
  - Don Mannel
  - Jeri Mihalic
  - Steve Homan
  - Zach Carnagey

FACILITATOR NOTES: This session serves multiple purposes. It:
- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students' learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day's events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework for the next day.
### CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
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<tbody>
<tr>
<td><strong>Course Coordinators</strong></td>
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<tr>
<td><strong>One-Minute Paper</strong></td>
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<tr>
<td>Introduce activity and purpose. Give one minute to jot down ideas about:</td>
<td>One-Minute Paper Handout</td>
<td>10 min.</td>
</tr>
<tr>
<td>• Most important information from the morning?</td>
<td></td>
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<tr>
<td>• Unclear information?</td>
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<tr>
<td>• What else do you most need to learn?</td>
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</tbody>
</table>

Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.

| GROUP DISCUSSION | | 15 min. |
| Ask for responses – Spend most time on q’s 2 & 3. | Discussion | |
| Clarify the unclear; write key answers (esp. to q’s 2 and 3) on flipchart to refer to throughout afternoon | | |

| REVIEW COURSE OBJECTIVES, HOMEWORK, AND WHAT TO EXPECT | | 5 min. |
| Review course content accomplished. | Presentation | |
| Review what objectives will be met tomorrow. | | |
| Review all homework tasks— | | |
| PMIS Project Submittal, Due Friday morning | | |
| Staffing Model Analysis, Due Monday morning | | |
DAY THREE
WEDNESDAY, OCTOBER 22, 2008

SESSION TITLE: One-minute paper review & Announcements

INSTRUCTORS/SPEAKERS: Course Coordinators

TRAINING AIDS:
- NONE

HANDOUTS:
- NONE

FACILITATOR NOTES/DIRECTIONS:

POINTS TO REMEMBER:
- Provide students with the opportunity to clarify any aspects of previous day that were unclear, as per one-minute paper.

ANNOUNCEMENTS
- For final presentations, each member of the team should speak equally (i.e. 10 minutes per individual)
- Reminder: Functional Analysis (Staffing model) due on Monday
- Reminder: PMIS Project Submittal due on Friday
- Review daily agenda
SESSION TITLE: Squad Meeting – Day 2: Event 1, *Visitation Trends*

INSTRUCTORS/SPEAKERS: SEOT Superintendent (Acting) – Don Mannel

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Recognize how visitation trends affect park management decisions
- Apply visitation trend data to adjust annual work plans

TRAINING AIDS:

HANDOUTS:
- Visitor report cards (50 per group)

FACILITATOR NOTES: This session serves multiple purposes. It:
- Introduces students to the idea that the simulation is going to be dynamic.
- Provides students with another data source that should influence an Annual Work Plan

POINTS TO REMEMBER: Because this is the first scripted event that students are dealing with, they may need to have hints that the visitor report cards should affect their Annual Work Plan. For example, “I'm tired of seeing same complaints every year. I don't want to get hit on bathrooms again.”
- Cast:
  - Supt. (Acting): Don Mannel
  - Chief of Interpretation: Zach Carnagey
  - Chief of Resource Mgmt: Betsy Dodson
### Visitation Trends

“I was just looking over the visitor report cards for last month and wanted to share a little of the ‘love.’ [looking through the cards] First, Interp. Some compliments on the Sea Otter Reintroduction talks. Good work. However, there are complaints that the American Indian programs are outdated and present a stereotyped image.”

*C.Interp:* “Well, that program is 15 years old. The problem is funding. I’ve been meaning to talk to you about that. I’d really like to develop a program that would appeal to our older visitors—

*Supt:* —Let’s talk about that later. Okay, Resource Management, some complaints about closing beach-accessible campsites because of birds.

*C. Res.Mgmt:* That’s been an issue for years, but there’s not much to do about it. The snowy plovers are an endangered species and the north and western beaches are one of their nesting areas. We have count and nesting data from last year so we’ll look at adjusting the closure period.

*Supt:* Sounds good. Maintenance, [looking through cards] I don’t know where to begin. I know you just got here, and it wasn’t your fault, but most of the complaints here are your issues. So, prioritize and see what you can do about this. I don’t want to get hit like this again.
Whether we like it or not, visitor satisfaction plays a big role in what we do. Without people coming to the park, there is no park. It’s like communication—without at least two people, one giving a message and one listening, no communication is taking place. The same is true here. Without visitors, Interp is going to be talking to themselves and Maintenance will be taking care of empty buildings that no one ever sees. Without visitors, this park might as well not exist.

What makes this relationship so interesting is that, even though we’re dependent on them, they’re also dependent on us. Visitors are not a homogenous group. They have conflicting values and priorities, and often those are not in line with the park’s. It’s our job to remember our mission and be true to it, and sometimes that means ‘yes,’ and sometimes that means saying ‘no.’

That’s the balance we have to strike. We need visitors for the park to survive, so we have to make sure they have a good experience. But sometimes, for the park to survive, we have to say ‘no’. It’s up to you to make the final call.

- At my park we use Visitor Satisfaction Cards…
- (When finished, pass out Visitor Cards. Give students a chance to look over cards.)

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<thead>
<tr>
<th>CONTENT</th>
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<tbody>
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<table>
<thead>
<tr>
<th>GROUP DISCUSSION</th>
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<tr>
<td>- Open floor for questions from students</td>
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<td>10 min.</td>
</tr>
<tr>
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<tr>
<td>- At my park we use Visitor Satisfaction Cards…</td>
<td></td>
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<tr>
<td>- (When finished, pass out Visitor Cards. Give students a chance to look over cards.)</td>
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</tbody>
</table>
SESSION TITLE: Project Planning

INSTRUCTORS/SPEAKERS: Christy McCormick

SESSION LENGTH: 1 hour

OBJECTIVES: At the end of this session, students should be able to:
- Articulate the purpose of Project Plans as a part of Project Management
- Clarify and apply the project details as they apply to Annual Work Planning for Sea Otter Island

TRAINING AIDS:
- Blank Project Plan Template (electronic)

HANDOUTS:
- Sample Project Plan

FACILITATOR NOTES: This session is In-Simulation and serves multiple purposes. It:
- Introduces the students to the concept of project plans as a part of Project Management
- It allows the students to work in groups that are NOT their SEOT teams
- Provides the students with some structure when planning how to develop their Annual Work Plan for SEOT

POINTS TO REMEMBER:
INTRODUCTION:
*Don Mannel*
You’re only getting one training session today because I wanted to make sure you had a chance to get a handle on what’s happening here at SEOT and to get started on your Annual Work Plans. Here’s my tip to make the most out of your time: plan. Although planning does take time in the beginning, it will save you time in the end. That said, planning is art not a science, so to guide you on how to make project plans we have planning artist Christy McCormick. She is a Project Management Consultant in an Organizational Development Company who has been primarily working overseas. We’ve been lucky to pull her in while she’s stateside. As an incentive to take what she says to heart, we’ll be expecting a project plan for your annual work plan on Friday, but she’ll tell you more about that in minute.

CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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</thead>
<tbody>
<tr>
<td><em>Christy McCormick</em></td>
<td>Lecture, PPT</td>
<td>5 min</td>
</tr>
<tr>
<td>Project Plans-Introduction and Purpose</td>
<td>Lecture, PPT</td>
<td>25 min</td>
</tr>
<tr>
<td>Dissecting the Project Plan</td>
<td>Lecture, PPT</td>
<td>25 min</td>
</tr>
<tr>
<td><strong>Class Activity</strong></td>
<td></td>
<td>30 min</td>
</tr>
<tr>
<td>• Divide class into three groups of six people</td>
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<tr>
<td>• Give each group one of the elements of a project plan</td>
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<tr>
<td>• Have them brainstorm possible entries into the project plan</td>
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<tr>
<td>• Present to the group at large</td>
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**Homework**

• Write Project Plan for Annual Work Plan
• DUE: Friday, Oct. 24th
SESSION TITLE: Student Work on SEOT Simulation

INSTRUCTORS/SPEAKERS: Students

SESSION LENGTH: 6 hours, 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Apply all of the competencies to create an Annual Work Plan and presentation based on the SEOT simulation.

TRAINING AIDS:
- SEOT Resource Kit
- Training Laptops

HANDOUTS:
- None

FACILITATOR NOTES: This session provides the students with time to:
- Begin analyzing SEOT asset management data in terms of the steps required for the development of an Annual Work Plan.
- Develop Project Plans to guide them through the planning process.
- Execute the preliminary steps of creating an Annual Work Plan.

POINTS TO REMEMBER:
- In-sim
- During this initial work session, the student groups will likely have many questions for the facilitators and HelpDesk team. The groups should be encouraged to work wherever they are most comfortable, but they should stay nearby so they can come ask questions and receive feedback when needed.
## CONTENT:

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<thead>
<tr>
<th>CONTENT</th>
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<tbody>
<tr>
<td>Students</td>
<td></td>
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</tr>
<tr>
<td>Small Group Work – SEOT Simulation</td>
<td>Facilitation, Small Group Work</td>
<td>6 hrs. 15 min.</td>
</tr>
<tr>
<td>• HelpDesk/Instructors circulate between groups for informal assessment and guidance</td>
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</table>

### HELP DESK/INSTRUCTOR TEAM INTERVIEW QUESTIONS:

These questions should be asked of each SEOT team and recorded by Help Desk or members of the Instructor Team.

Team Name: _______________________  Interviewer: _____________________

Date: ___________________________

1. Open-ended question: “How are you progressing with the project?”

2. What documents are you compiling?

3. What are you using them for?

4. Document any impediments noted through the interview process

5. Additional Notes?
SESSION TITLE: One-Minute Paper and Instructor Evaluation

INSTRUCTORS/SPEAKERS: Course Coordinators

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:

- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluation
  - Christy McCormick

FACILITATOR NOTES: This session serves multiple purposes. It:

- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students’ learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.

- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework for the next day.
## CONTENT:

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</thead>
</table>
| **Course Coordinators**<br>**One-Minute Paper**<br>Introduce activity and purpose. Give one minute to jot down ideas about:  
- Most important information from the morning?  
- Unclear information?  
- What else do you most need to learn? | One-Minute Paper Handout | 10 min. |
| Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning. | | |

| GROUP DISCUSSION | | |
| Ask for responses – Spend most time on q’s 2 & 3.  
Clarify the unclear; write key answers (esp. to q’s 2 and 3) on flipchart to refer to throughout afternoon | Discussion | 15 min. |

| REVIEW COURSE OBJECTIVES, HOMEWORK, AND WHAT TO EXPECT | | |
| Review course content accomplished.  
Review what objectives will be met tomorrow.  
Review all homework tasks—*Project Plan* Due Friday morning | Presentation | 5 min. |
DAY FOUR
THURSDAY, OCTOBER 23, 2008

SESSION TITLE: One-minute paper review & Announcements

INSTRUCTORS/SPEAKERS:

TRAINING AIDS:

HANDOUTS:

FACILITATOR NOTES/DIRECTIONS:
  • Pick up Project Plan before any other announcements

POINTS TO REMEMBER:
  • Provide students with the opportunity to clarify any aspects of previous day that were unclear, as per one-minute paper.

ANNOUNCEMENTS
  • Squad meeting canceled. Distribute memo from Supt. to students
  • Review daily agenda
  • Time management session is tonight from 6:30-8:00 pm- Mandatory
Memo

To: Division Chiefs

From: Steve Wolter, Superintendent

CC: 

Date: 10/22/09

Re: 10/23/09 Squad Meeting Canceled

Unfortunately, the acting Supt. has some things to take care of on Thursday the 23rd, so we’re canceling the Squad Meeting that morning. However, I didn’t want you to get bored so I scheduled a number of training sessions for the day; however, first I’ve decided to give you a couple hours to work on your own. Thought you might enjoy that.

Steve Wolter

Superintendent

Sea Otter Island National Park
SESSION TITLE:  Group Work on SEOT Simulation

INSTRUCTORS/SPEAKERS:  Course Coordinators, HelpDesk

SESSION LENGTH:  2 hours

OBJECTIVES:  At the end of this session, students should be able to:

- Apply all of the competencies to create an Annual Work Plan and presentation based on the SEOT simulation.
- Present their findings on the SEOT simulation to their peers and mentors.

TRAINING AIDS:
- SEOT Resource Kit
- SEOT Electronic Resource Kit

HANDOUTS:
- 

FACILITATOR NOTES:  This session provides:

- Additional time for small groups to work together on developing the SEOT Annual Work Plan.
- An opportunity to develop small group presentations and ask further questions of the HelpDesk and others.
- A chance to begin combining information learned during previous course sessions with the SEOT simulation work, such as budgeting, management and supervision, and technical writing.

POINTS TO REMEMBER:
- The HelpDesk will be instrumental in assisting the students with the final preparations.
## CONTENT:

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<tr>
<th>CONTENT</th>
<th>METHOD</th>
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<tbody>
<tr>
<td>Course Coordinators, HelpDesk</td>
<td>Facilitation, Small Group Work</td>
<td>2 hrs</td>
</tr>
<tr>
<td>Small Group Work – SEOT Simulation</td>
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SESSION TITLE: Cultural and Natural Resource Issues in Facility Management and Natural Resources

INSTRUCTORS/SPEAKERS: Russell Galipeau, Supt of Channel Islands

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:
- Describe the importance of facility management in protection of natural and cultural resources.
- Describe the importance of facility management in the national parks.
- Identify the relationships among facility management and cultural and natural resource management.

TRAINING AIDS:
- Video of Hartzog section of Interior
- Flip Chart and Markers

FACILITATOR NOTES:
- This session should be interactive and the speaker should encourage discussion
- When asking students to share perspective in the initial activity, please remind them to keep it to one-two minutes or less.

POINTS TO REMEMBER:
- In-Simulation
Introduction:

Don Mannel

Probably more than any other division, Cultural and Natural Resource Management is linked to the Maintenance Division. It is critical that you are aware of the role that facility management plays in cultural and natural resource management. Russell Galipeau is a former Chief of Resource Management and the current Superintendent at Channel Islands National Park.

CONTENT:

<table>
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<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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</thead>
<tbody>
<tr>
<td>Russell Galipeau</td>
<td>Class Discussion</td>
<td>30 min</td>
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</tbody>
</table>
| - Share a Story: After sharing instructor perspective, have each student share his/her most interesting cultural or natural resource they have ever worked with.  
- Provide a perspective on competing priorities between cultural and natural resources at CHIS and role as superintendent to forecast the next activity | | |

Russell Galipeau

- Shared Responsibilities Activity
- Divide Class into groups of three
- Each person plays a role (Superintendent, Cultural Resource Manager, Natural Resource Manager)
- Answer the following questions:  
  - What are our shared responsibilities?  
  - How can our roles complement each other?  
  - What are our mutual expectations?

DEBRIEF:

Each group should prepare a short (2min) presentation to answer these questions, which can be posted on a flip chart.
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<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
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<tbody>
<tr>
<td>Russell Galipeau</td>
<td>Class Activity</td>
<td>60 min</td>
</tr>
<tr>
<td>• Case Study</td>
<td></td>
<td></td>
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<tr>
<td>• Have class count off by “fives”</td>
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<tr>
<td>• Give each group a case study</td>
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<tr>
<td>• Answer questions provided on case study sheet</td>
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<tr>
<td>• Identify the steps in project planning/implementation that were important in the case study</td>
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<tr>
<td>• Be prepared to discuss to the group at large</td>
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NPS Facility Manager Leaders Program  
Cultural and Natural Resources Session  
Management and Leadership case Studies  

Case Study I. The Costly Restroom

You are the facility manager of a developing National recreation Area on the East Coast. Your park has been fortunate in obtaining funds for construction of much needed infrastructure. The park has recently completed several construction projects for visitor services, including trails, visitor contact stations, restrooms, and other facilities. The project is identified in general terms in the park's GMP. Planning and design was completed, compliance was instituted under the Environmental Impact Statement for the GMP, though the EIS was very vague for this project. The project was constructed and completed earlier this year. You were the project manager for this construction project.

Earlier this week, you have been contacted by a national news service, asking questions about the costs of construction for some of these facilities, including a composting toilet restroom facility that has been constructed for a total over $300,000. A news article was subsequently published questioning the cost of the construction and the value of the facility for the public. Since that initial article, several other news media have also called for interviews, and you have received a congressional inquiry for additional information.

Questions:

- What natural and cultural resource issues do you need to think about as you begin steps to manage this situation?
- What sections of the compliance documents may help or hurt you in responding to the press and public?
- What might you have done differently in managing the compliance for this project?
- Who should you contact for assistance, both inside and outside the park?
- What aspects of working with Cultural and Natural Resources Divisions might assist in mitigating the negative press that the park is receiving?
NPS Facility Manager Leaders Program  
Cultural and Natural Resources Session  
Management and Leadership case Studies

Case Study II. The Natural Disaster

You are the facility manager of a small National Memorial in the Southwest. Your park has recently had a fairly major fire that has depleted your resources, but you have successfully begun a plan for recovery. However, over the past twenty four hours, the park has been hit with thunderstorms that have poured over 12 inches of rain on most of the park (the equivalent of a normal year’s precipitation). The forecast is for more rain over the next week. The park’s facilities have been effectively destroyed: the entrance road is washed out in a number of places, initial reports indicate that both the park’s water and sewer systems are completely destroyed, visitor service areas (picnic grounds, visitor center, trails etc.) have been reported to have various levels of damage. You have closed the park to visitors for safety reasons. You and the park staff now need to craft a plan for park stabilization and recovery.

Questions:

- What natural and cultural resource issues do you need to think about as you begin initial steps to manage this situation?
- What compliance issues do you expect might be important as you begin recovery efforts?
- How does the impact of emergency recovery affect your management of compliance issues?
- Who should you contact for assistance and for consultation, both inside and outside the park?
- What laws and regulations will be important in the recovery activities?
Case Study III. The Angry Neighbor

You are the facility manager of a small National Park area in the Northwest. Your park has had a policy of no snowmobile operation in place since the 1970’s, and the park has historically provided for public comment and input on that policy several times in the past. Recently a private park in-holder (a person who owns private property totally surrounded by NPS land) has asked for permission to use a snowmobile across park property to access his property through the winter months. The park superintendent has denied his request, but has offered to work with him to find another reasonable solution to address his need for access. Today, the U.S. Federal District Court has informed the park that the in-holder has filed a lawsuit in district court, and the court has issued a temporary restraining order against the NPS requiring you to allow the in-holder to use a snowmobile to access his property until a hearing on the case is scheduled. A date has been set for a hearing for Tuesday next week (it is currently Friday afternoon) at which the NPS will need to present a case to support its prohibition of snowmobile use. IF the park is unsuccessful in presenting this case, the court will impose an injunction against the park, allowing for continued use of snow machines within the park for the in-holder. You and the park staff now need to craft a strategy to build a case for presentation in 72 hours in Federal District Court.

Questions:

- What initial steps should you take to manage this situation?
- What natural and cultural resource issues do you need to think about as you begin initial steps to manage this situation?
- What compliance issues do you expect might be important as you begin to respond to the court case?
- Who should you contact for assistance, both inside and outside the park?
NPS Facility Manager Leaders Program
Cultural and Natural Resources Session
Management and Leadership case Studies

Case Study IV. The Resource Peril

You are the facility manager of a medium sized National Recreation Area in the Midwest. Your park’s primary resource (and the reason it was established) is a large and geologically complex aquifer system that produces many natural mineral and firewater springs and artesian wells within your park boundaries. Over time, some of these springs have ceased to flow due to use from a variety of sources. This aquifer also provides water for municipal use for area towns and cities and for other state and federally managed recreation and wildlife areas. It is the source for a number of lakes and reservoirs in the area. There is little available research on the aquifer at this time. Today, one of the park neighbors, who has had a good relationship with the park in the past, came to your office to tell you that he has entered into a contract with a third party to sell his ground water rights to a consortium of cities approximately 100 miles away, and that a private company is planning to pump several million gallons of water a day from the aquifer. Your quick calculations indicate that this rate of removal would effectively exhaust the aquifer and potentially dry up the park’s streams and springs within as little as 20 years. A quick check of current state water management statues indicates that the landowner is legally entitled to sell his water rights for this purpose. You and the park staff now need to craft a strategy to respond to what you believe to be an immediate threat (and possible impairment) to park resources.

Questions:

- What impacts will this situation have on your job as a facility manager?
- What cultural and natural resource issues should you be aware of in managing this issue?
- Are there any compliance issues that you need to be aware of in this issue?
- Are there any laws and regulations that may help you in protecting park resources from this threat?
- Who should you contact for assistance, both inside and outside the park?
NPS Facility Manager Leaders Program
Cultural and Natural Resources Session
Management and Leadership case Studies

Case Study V. The Changing Road Project

You are the facility manager of a group of medium-sized parks in the west. The parks contain substantial cultural and natural resources near (and under) the parks’ facilities. Your park has received funding for a very large Federal highways road construction project connecting two of those parks, and an EA was completed for the construction program. Project was designed to minimize the impact on cultural resources, but this has led to a situation where all needed work cannot be completed within the scope of the existing compliance. Due to excellent management, there are funds remaining that could be used for additional work on the park entrance road shoulders. However, the scope of the work is outside the original description for this project. Both cultural resources (archeological sites) and natural resources (protected prairie dog habitat) are involved. Part of the road is located on US Forest Service land.

You have limited time in which to use the available remaining fund. Compliance for the proposed project, in the view of cultural and resource management experts, is not complete, and will take substantial time to develop. The contractor, who you would like to do this additional work, will be leaving the park in two weeks.

Questions:

- What are your options in managing this situation?
- What natural and cultural resource issues do you need to address to move this project forward?
- Who should you contact for assistance, both inside and outside the park?
- What competencies and executive core qualifications would help you in dealing with this situation?
SESSION TITLE: Briefing your staff on Informal Visitor Contacts

INSTRUCTORS/SPEAKERS: Deanne Adams

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:
- Design high quality customer service strategies.
- Develop answers to the frequently asked questions at their site.
- Read basic visitor cues and respond appropriately.

TRAINING AIDS:
- Flip chart and Markers
- PowerPoint
- Index cards

HANDOUTS:
- Visitor cues scenario cards
- The page number for the Body Language Translations table in the student manual

FACILITATOR NOTES:
- In-simulation
- Should be focused on training your subordinates in customer service through Informal Visitor contacts

POINTS TO REMEMBER:
- As a supervisor you need to support development of your employees to be aware of expectations outside their regular duties.
- Visitors are an integral part of the park and they do not distinguish between employees of different disciplines so all employees have a responsibility to provide effective informal visitor contacts.
INTRODUCTION:

Don Mannel

Facility Maintenance has the most employees of any of the divisions and those workers are often outside and interacting with visitors. As a manager, you need to help your employees become more aware of how they are dealing with visitors and give them some techniques to enhance their visitor contacts. Deanne Adams is the Regional Chief, Interpretation and Education for PWR, and she’ll be bringing some of these issues to light.

CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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<tbody>
<tr>
<td><strong>Introduction to Informal Visitor Contacts</strong></td>
<td>Presentation, Activity</td>
<td>10 min.</td>
</tr>
<tr>
<td>• Visitors believe any uniformed employee should be able to answer their questions and meet their needs.</td>
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<tr>
<td>• While few facility maintenance employees will deliver a formal presentation to the visitors, all maintenance employees will provide orientation and information to visitors.</td>
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<tr>
<td>• Interpretation can help the visitor care about the resource so that they may be motivated to help care for it.</td>
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<tr>
<td>• Interpreters refer to spontaneous, casual contacts with the visitor, the kind that facility maintenance employees engage in, as informal visitor contacts.</td>
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</table>

Transition: So what does an effective informal visitor contact look like?

Student Exercise: Have participants reflect on their own experiences as visitors:

- Describe a situation where they needed to get directions while at a site on vacation. Who gave them directions? How were the directions provided?
- Describe a situation where they needed specific information to make their visit more enjoyable. Who provided that information? How was it provided?
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<thead>
<tr>
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<tbody>
<tr>
<td><strong>Powerpoint Presentation</strong></td>
<td>PowerPoint</td>
<td>15 min.</td>
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<tr>
<td>• What is an informal visitor contact?</td>
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<tr>
<td>• Why are informal visitor contacts so important?</td>
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<td></td>
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<tr>
<td>• What types of informal visitor contacts are there?</td>
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<td></td>
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<tr>
<td>• The Interpretive Continuum</td>
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<tr>
<td>• How do informal visitor contacts help fulfill the NPS mission?</td>
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<tr>
<td><strong>Best Practices in Customer Service</strong></td>
<td>Brainstorm, Flipchart</td>
<td>10 min.</td>
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<tr>
<td>Student Exercise: Brainstorm best practices in customer service.</td>
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<tr>
<td>• Include discussion of worst customer service to flush out things not to do as well as things to do.</td>
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<tr>
<td>• Discuss the KR x KA + AT = IO formula.</td>
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<tr>
<td>o KR=Knowledge Resource</td>
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<tr>
<td>o KA=Knowledge of Audience</td>
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<tr>
<td>o AT=Selecting Audience Techniques</td>
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<td></td>
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<tr>
<td>o IO=Interpretation Opportunity</td>
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<tr>
<td><strong>Self-Evaluation</strong></td>
<td>Activity</td>
<td>15 min.</td>
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<tr>
<td>• Have the class complete the Best Practices in Customer Service Activity Sheet.</td>
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<tr>
<td><strong>Visitor Cues</strong></td>
<td>Brainstorm, Flipchart, PowerPoint</td>
<td>20 min.</td>
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<tr>
<td>Assessing visitor needs is essential in conducting effective informal visitor contacts. Visitor cues help determine initial needs and evaluate options while guiding progression of each contact.</td>
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<tr>
<td>Visitor Cues (PowerPoint)</td>
<td></td>
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<tr>
<td>• What’s the big deal about visitor cues?</td>
<td></td>
<td></td>
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<tr>
<td>• How do visitors communicate their needs?</td>
<td></td>
<td></td>
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<tr>
<td>• Verbal Communication</td>
<td></td>
<td></td>
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<tr>
<td>• Body Language</td>
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</table>
Informal Visitor Contacts Scenarios

- Have groups of three role play informal visitor contact scenarios.
- One serves as visitor, one serves as employee, and one serves as note taker.
- Be sure the visitors provide non verbal cues that help reveal his or her state of mind. Employee should act as if in a real informal visitor contact; must do their best to read and react to visitor cues and provide for the visitor’s needs.
- Participants should use the *Body Language Translations* hand out located in Visitor Cues tutorial in their student manual.

Debrief

- Ask note takers to share what happened in their groups/what they witnessed.
- Ask “employees” which visitor cues they saw. Ask class whether they witnessed any other cues.
- Have “visitors” explain which cues they were attempting to portray and ask them to read the scenario to the class.

Transition: Did any of you feel like you need to know more about your site to completely meet the visitors’ needs? Third component of effective informal visitor contacts is knowing your site.

Know Your Site Activity Sheet

Have students complete “Know Your Site” activity sheet in student workbooks.
- Ask if any of them want to share their thoughts about it.

Conclude Session
Student Exercise – Informal Visitor Contacts Scenarios

In this role playing activity you will be a visitor to a National Park. Take a moment to read the scenario and think about what cues (verbal and non-verbal) you can give to the NPS employee during this informal visitor contact to help her or him meet your needs.

It is 1:40 p.m. You have just arrived at the site. You want to find a place to walk your dog before he has an accident in your camper. You are anxious about finding a good spot to take him quickly so that you may put him back in your camper and catch the 2 p.m. tour. Approach the employee and ask where you can walk your dog.

In this role playing activity you will be a visitor to a National Park. Take a moment to read the scenario and think about what cues (verbal and non-verbal) you can give to the NPS employee during this informal visitor contact to help her or him meet your needs.

You have visited this site many times before. In fact, your father brought you here when you were a small child. The site means a lot to you but it has changed. You want to tell the park employee how great this place used to be and discuss why it has changed so much. Approach the employee and ask how long they have worked at the park.
In this role playing activity you will be a visitor to a National Park. Take a moment to read the scenario and think about what cues (verbal and non-verbal) you can give to the NPS employee during this informal visitor contact to help her or him meet your needs.

You’re halfway through a week-long stay at this site and have run out of things to do. As you’re wandering up to the bath house, in no particular hurry, you see a uniformed employee. Approach the person and ask what there is to do around here.

You like to collect things and on your hike you found what looks like an arrowhead. It would be a perfect addition to your collection but it would be helpful to know what it is and who may have made it. Approach the employee and ask if what you’ve found is an arrowhead.
In this role playing activity you will be a visitor to a National Park. Take a moment to read the scenario and think about what cues (verbal and non-verbal) you can give to the NPS employee during this informal visitor contact to help her or him meet your needs.

Although you haven’t necessarily come to this site to see birds, you are an avid birder and take any chance you can to see new species. You think you might have just caught a glimpse of a bird you have never seen before and didn’t expect to see here. You really want to identify it and learn more about why it would be here. Approach the employee and ask if there is a bird list for the site.
SESSION TITLE: Accessibility

INSTRUCTORS/SPEAKERS: Dave Park

SESSION LENGTH: 1 hour, 15 minutes

OBJECTIVES: At the end of this session, students should be able to:

•

TRAINING AIDS:

HANDOUTS:

FACILITATOR NOTES: This session serves multiple purposes. It:

•

POINTS TO REMEMBER:

• In-Simulation

[Note: Dave Park is presenting a previously prepared presentation. No instructional design is required]
INTRODUCTION:

Don Mannel

SEOT has not met its goals for accessibility and compliance with ADA standards. You may have seen on the website that Interpretation already has some accessibility programs in place, but we’re behind from a facilities point of view. So we’ve invited Dave Park here to help address some of these issues. Mr. Park from WASO and is one of the foremost experts on accessibility in the NPS and has spent his career improving accessibility in national parks.

CONTENT:

<table>
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<tr>
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<tbody>
<tr>
<td>Dave Park</td>
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</table>
SESSION TITLE: One-Minute Paper and Instructor Evaluation

INSTRUCTORS/SPEAKERS: Course Coordinators

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluations
  - Russell E. Galipeau
  - Deanne Adams
  - Dave Park

FACILITATOR NOTES: This session serves multiple purposes. It:
- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students’ learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework for the next day.
  - PMIS project
  - Project Plan for Annual Work Plan
## CONTENT:

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<tr>
<td><strong>Course Coordinators</strong></td>
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<tr>
<td><strong>One-Minute Paper</strong></td>
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<tr>
<td>Introduce activity and purpose. Give one minute to jot down ideas about:</td>
<td>One-Minute Paper Handout</td>
<td>10 min.</td>
</tr>
<tr>
<td>- Most important information from the morning?</td>
<td></td>
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<tr>
<td>- Unclear information?</td>
<td></td>
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</tr>
<tr>
<td>- What else do you most need to learn?</td>
<td></td>
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<tr>
<td>Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.</td>
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<tr>
<td><strong>Group Discussion</strong></td>
<td>Discussion</td>
<td>15 min.</td>
</tr>
<tr>
<td>• Ask for responses – Spend most time on q’s 2 &amp; 3.</td>
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<tr>
<td>• Clarify the unclear; write key answers (esp. to q’s 2 and 3) on flipchart to refer to throughout afternoon</td>
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</tr>
<tr>
<td><strong>Review Course Objectives, Homework, and What to Expect</strong></td>
<td>Presentation</td>
<td>5 min.</td>
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<tr>
<td>• Review course content accomplished.</td>
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<tr>
<td>• Review what objectives will be met tomorrow.</td>
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<tr>
<td>• Review all homework tasks</td>
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</table>
SESSION TITLE: Time Management: How to Prioritize Work

INSTRUCTORS/SPEAKERS: Jeri Mihalic, Christy McCormick

SESSION LENGTH: 1 hour, 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Apply strategies to increase productivity by managing time on a day-to-day basis.
- Develop time management skills.
- Develop a time management plan.
- List three practical methods to overcome time management challenges.

TRAINING AIDS:
- Optional Prizes (clock, timer, etc.)
- Add Time Management Books to Lending Library
- Food from the free Happy Hour next door.

HANDOUTS:
- How Well Do You Plan? Survey
- Common Time Stealers and Time Stealers Survey
- Solutions for Managing your Time – Handout and Activity Worksheet
- Time Management Resources

FACILITATOR NOTES: This session serves multiple purposes. It:
- Assists FMLP students in completing assignments and balancing workload from the FMLP with work and home life.
- Describes the advantages of time management, including:
  - gaining time
  - motivating and initiating
  - reducing avoidance and procrastination
  - promoting review of assignments and course materials
  - eliminating cramming
  - reducing anxiety
- Helps students to manage their time by providing steps or tips to become a more effective time manager.

POINTS TO REMEMBER:
- The FMLP is very much like a college course. Many students discover the need to develop or hone their time management skills when they arrive at college.
- Keys to Successful Time Management include:
  - Self Knowledge and Goals: In order to manage your time successfully, having an awareness of what your goals are will assist you in prioritizing your activities.
  - Developing and Maintaining a Personal, Flexible Schedule: Time management provides you with the opportunity to create a schedule that works for you, not for
others. This personal attention gives you the flexibility to include the things that are most important to you.
## CONTENT:

<table>
<thead>
<tr>
<th>Jeri Mihalic</th>
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<tbody>
<tr>
<td><strong>Start with Time Management Survey and Question and Answer Period</strong></td>
</tr>
<tr>
<td>Pass out surveys; ask students to fill them out.</td>
</tr>
<tr>
<td>- Ask people to share if they would like. Are they surprised? Does the assessment match what they thought?</td>
</tr>
<tr>
<td>What do you do to effectively manage your time?</td>
</tr>
<tr>
<td>- Positive; we will get into the problems later.</td>
</tr>
<tr>
<td>Jeri Mihalic and Christy McCormick</td>
</tr>
<tr>
<td><strong>Sharing Personal Stories of Managing Time</strong></td>
</tr>
<tr>
<td>Became more effective time manager once had less time.</td>
</tr>
<tr>
<td>- Franklin-Covey system – Setting goals to prioritize spending time. Start with values, then move to career goals, intermediate steps for getting there, prioritize list of tasks.</td>
</tr>
<tr>
<td>- Daily To-Do List – Don’t procrastinate until the night before it is due. Know your deadlines, keep track of them, and estimate how long it will take you.</td>
</tr>
<tr>
<td>- Prioritization: A-C. Do A’s first thing in the day when you’re fresh, focus on those. Save C’s and below for later in the day when your energy level is low.</td>
</tr>
<tr>
<td>Multi-Tasking and Making Time</td>
</tr>
<tr>
<td>- Multi-Tasking – Started in college. ID deadlines, create to-do list. Prioritize list as I go.</td>
</tr>
<tr>
<td>- When getting masters degree, set aside certain days for certain activities. Of course, there are still emergencies – but you have to have a plan by which you can operate without the emergencies, then filter in the emergencies as they come. Also, found time for myself on the weekends (traveling, wandering around town, hiking, etc.).</td>
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<tr>
<td>- Current Position: Importance of Strategic Reserve Time.</td>
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</table>
**Jeri Mihalic**

**Common Time Stealers**
- Refer to student handout.

Student Exercise: Identify your time stealers.
- Have students review the “Time Stealers” list in their student workbooks. Have them place a star next to items that steal their time occasionally, two stars next to items that often steal their time, and nothing next to items that rarely or never steal their time.
- Ask the students to share their major time stealers first. If there is time, ask them to share their minor time stealers as well.

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<tr>
<td>Jeri Mihalic Common Time Stealers</td>
<td>Presentation, Activity</td>
<td>20 min.</td>
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</table>
### Solutions for Managing your Time

Refer to Time Management Tips handouts. Ask students to review them briefly.

- Group students into triads and ask them to identify specific methods they can use to better manage their time.
- Start with their time stealers, then identify ways of getting that time back.
- This is a group exercise – Share with each other, provide constructive feedback or ideas of possible solutions. Most of all, be honest with each other!
- Debrief: Bring groups back together and ask people to share their solutions. What will work? What might work for others but not for you?

Possible Solutions:
- Outline deadlines, prioritize tasks
- Closed door policy or Strategic Reserve Time
- Come in early or stay later than others
- Planning ahead
- Delegate, train employees, and trust them
- Set email response time
- Emergencies happen; deal with them, have others deal with them, and move on

### Time Management Resources

Provide list of resources for classes, books, articles, etc.

- Franklin-Covey Course/Planner
- Tyranny
- How to be Organized in Spite of Yourself
- Seven Habits of Highly Effective People,
- One-Minute Manager
- Five good minutes at the End of the Day
DAY FIVE
FRIDAY, OCTOBER 24, 2008

SESSION TITLE: One-minute paper review & Announcements

INSTRUCTORS/SPEAKERS: Course Coordinators

TRAINING AIDS:

HANDOUTS:

FACILITATOR NOTES/DIRECTIONS:
- Collect homework before beginning
- DUE: PMIS Project Submittal
  Annual Work Plan Project Plan

POINTS TO REMEMBER:
- Provide students with the opportunity to clarify any aspects of previous day that were unclear, as per one-minute paper.

ANNOUNCEMENTS
- Review daily agenda
- Instructors share “lessons learned” and advice about working this weekend
SESSION TITLE: Squad Meeting – Day 4: PAMP
Scripted Event 2, 1.5% reduction in Budget

INSTRUCTORS/SPEAKERS: Betsy Dodson, SEOT Superintendent (Acting)

SESSION LENGTH: 1 hour

OBJECTIVES: At the end of this session, students should be able to:
- Evaluate the accuracy of the PAMP by comparing PAMP data with actuals
- Evaluate PAMP by comparing actuals to Industry Standards
- Recognize key concepts in an EMS which affect Facility Management decisions

TRAINING AIDS:

HANDOUTS:

FACILITATOR NOTES: This session serves multiple purposes. It:

POINTS TO REMEMBER:
- Homework: Critical Systems Priority List
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<th>CONTENT</th>
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</table>
| **Betsy Dodson – SEOT Acting Superintendent**  
**PAMP Analysis and Revision**  
- Provide overview and ask for questions about PAMP  
- Evaluate accuracy of PAMP by comparing actuals with operationals  
- Evaluate PAMP by comparing actuals with industry standards  
- Provide Execution Worksheet which WASO hasn’t processed  
- Have PAMP priorities shifted?  
  - Might recommend changes as necessary  
- Homework Critical Systems Priority List, Due Monday  
  - Create a list of equipment you want to establish PMs for based on API and critical systems  
    - Re-Adjust to Optimizer Bands 1 and 2 based on budget  
    - Note Percent of PM's against it | Lecture/Discussion | 50 min |
| **Maintenance Budget Reduction**  
- Happy to report a new Interp. program geared toward older visitors  
- Development will start immediately and implementation in 1-2 months  
- Unfortunately, had to cut 1.5% of Maint. budget to fund the program. | Lecture/Discussion | 10 min |
SESSION TITLE: Lecturette 4: Fleet, Fuel, and Other Fixed Costs

INSTRUCTORS/SPEAKERS: Don Mannel

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Identify GSA vehicle costs, and rolling stock costs
- Evaluate fixed fuel cost within the park structure
- Evaluate fleet size in regard to park facility maintenance needs

TRAINING AIDS:
- Flip Charts

HANDOUTS:

FACILITATOR NOTES: This session serves multiple purposes:
- Bring out the concept of fixed costs, but that in the student’s annual work plan, they will need to anticipate trends-such as higher fuel costs
- What are the fleet needs of the park and how do you “right size” it to meet needs?

POINTS TO REMEMBER:
Introduction:
Don Mannel
By this point, you’re probably far enough into your Annual Work Plan that you’re starting to get into more specifics with costs and budgeting. To help you along this difficult path I thought I’d talk with you about fleet, fuel, and other fixed costs.

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<th>CONTENT</th>
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<tbody>
<tr>
<td>Don Mannel</td>
<td>Lecture and Class Discussion</td>
<td>15 min</td>
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<tr>
<td>Brainstorming Activity-Generate a list of Fixed Costs on a flipchart</td>
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<tr>
<td>Where is the documentation of your park’s fixed costs?</td>
<td>Class Discussion</td>
<td>15 min</td>
</tr>
<tr>
<td>How/Where do these costs fit into an Annual Work Plan?</td>
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</table>
SESSION TITLE: Group Work on SEOT Simulation

INSTRUCTORS/SPEAKERS: Students

SESSION LENGTH: 6 hours, 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Apply all of the competencies to create a PAMP and presentation based on the SEOT simulation.
- Present their findings on the SEOT simulation to their peers and mentors.

TRAINING AIDS:
- SEOT Simulation Materials: GMP, unigrid, website
- FMSS Database
- AMRS Reports

HANDOUTS:

FACILITATOR NOTES: This session provides:
- Additional time for small groups to work together on developing the SEOT PAMP.
- An opportunity to develop small group presentations and ask further questions of the HelpDesk and others.
- A chance to begin combining information learned during previous course sessions with the SEOT simulation work, such as budgeting, management and supervision, and technical writing.

POINTS TO REMEMBER:
- This is the last scheduled class time that the students will have to work on their Annual Work Plans and presentation. As such, the HelpDesk will be instrumental in assisting the students with the final preparation and production of their Annual Work Plans.
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<th>CONTENT</th>
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<tbody>
<tr>
<td>HelpDesk, Course Coordinators</td>
<td>Small Group Work</td>
<td>5 hrs</td>
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<tr>
<td>Small Group Work – SEOT Simulation</td>
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</tbody>
</table>
SESSION TITLE: Lecturette 5: Seasonality and Special Events

INSTRUCTORS/SPEAKERS: Jeri Mihalic

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Summarize the impact of visitation trends on maintenance and operations planning.
- Summarize the need to incorporate seasonality issues in maintenance and operations planning.

TRAINING AIDS:
- Calendar of Events, Visitation statistics, Resource Inventory and protected species requirements
- General Management Plan (students already have paper copies)
- SEOT Website

HANDOUTS:

FACILITATOR NOTES:

POINTS TO REMEMBER:
- Point the students in the right direction to having one component of their Annual work plan be a schedule by month (without actually TELLING them)
- Encourage discussion among the participants to see how this may be accomplished in other parks
Introduction:
Don Mannel
Being stuck in here like you have been, it’s hard to remember that there is a world outside, and that that world changes with the seasons, and that you have different responsibilities and worries with those seasons. AO Jeri Mihalic is back to bring up some issues concerning planning for seasonality and special events.

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<th>CONTENT</th>
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<tbody>
<tr>
<td>Jeri Mihalic &lt;br&gt;• Brainstorming Activity-How do visitation trends affect Operations and Maintenance planning? How does seasonality affect Operations and Maintenance Planning? &lt;br&gt;• Record on Flipchart &lt;br&gt;• What do Special Events do to your budget?</td>
<td>Lecture, Q &amp; A</td>
<td>15 min</td>
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</tbody>
</table>

• Using your calendar to plan | Lecture, Class Discussion |
SESSION TITLE: One-Minute Paper and Conclusion of Day

INSTRUCTORS/SPEAKERS: Course Coordinators

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout

FACILITATOR NOTES: This session serves multiple purposes. It:
- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students’ learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework for Monday.
  - Functional Analysis (staffing model)
  - Critical Systems Priority List
- Remind students that, although they have homework, they need to take some time to enjoy the area.
**CONTENT:**

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<th>CONTENT</th>
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<tbody>
<tr>
<td><strong>Course Coordinators</strong></td>
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<tr>
<td><strong>One-Minute Paper</strong></td>
<td>One-Minute Paper</td>
<td>10 min</td>
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<tr>
<td>Introduce activity and purpose. Give one minute to jot down ideas about:</td>
<td>Handout</td>
<td></td>
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<tr>
<td>• Most important information from the morning?</td>
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<tr>
<td>• Unclear information?</td>
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<tr>
<td>• What else do you most need to learn?</td>
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<tr>
<td>Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.</td>
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<tr>
<td><strong>Course Coordinators</strong></td>
<td>Discussion</td>
<td>15 min</td>
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<tr>
<td><strong>Group Discussion</strong></td>
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<tr>
<td>• Ask for responses – Spend most time on q’s 2 &amp; 3.</td>
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<tr>
<td>• Clarify the unclear; write key answers (esp. to q’s 2 and 3) on flipchart to refer to throughout afternoon</td>
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<tr>
<td><strong>Course Coordinators</strong></td>
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<tr>
<td><strong>Review Course Objectives, Homework, and What to Expect</strong></td>
<td>Presentation</td>
<td>5 min</td>
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<tr>
<td>• Review course content accomplished.</td>
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<td>• Review what objectives will be met Monday</td>
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<tr>
<td>• Review all homework tasks.</td>
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<tr>
<td>o Functional Analysis (staffing model)</td>
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<td>o Critical Systems Priority List</td>
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DAY SIX
MONDAY, OCTOBER 27, 2008

SESSION TITLE: One-minute paper review & Announcements

INSTRUCTORS/SPEAKERS: Course Coordinators

TRAINING AIDS: None

HANDOUTS:
• Hand out graded homework (PMIS Project, Project Plan)

FACILITATOR NOTES/DIRECTIONS:
• Pick up new homework before beginning
• DUE: Critical Systems Priority List
  Functional Analysis (staffing model)

POINTS TO REMEMBER:
• Provide students with the opportunity to clarify any aspects of previous week that were unclear, as per one-minute paper.

ANNOUNCEMENTS
• Review daily agenda
• Tomorrow night evening social with mentors
SESSION TITLE: Squad Meeting – Day 5: Solid Waste Reduction Event 3, ADA Project

INSTRUCTORS/SPEAKERS: SEOT Superintendent (Acting), Steve Wolter Teresa Dickinson

SESSION LENGTH: 1 hour, 15 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Summarize EO 13423
- Describe the impact EO 14323 has on purchasing and work planning in facility management
- Identify methods of reducing solid waste

TRAINING AIDS:
- EO 13423 (SEOT Resource Kit)

HANDOUTS:
- 

FACILITATOR NOTES: This session serves multiple purposes.
- Informs students of an Executive Order which mandates environmental sustainability practices.
- Remind the students that they need to include recycling and green purchasing in their Annual Work Plans

POINTS TO REMEMBER:
- Insure non-student Chiefs know that they will be called on to model summary and application of EO 13423
- Homework: ADA PMIS Project, due tomorrow morning.
- CAST:
  - SEOT Supt. – Steve Wolter
  - Chief, Resource Mgmt – Betsy Dodson
  - Chief, Administration – Jeri Mihalic
  - Chief, Interpretation – Zachary Carnagey
  - Chief, Protection – Amy Gregor
  - Chief, Maintenance - Students
**SEOT Superintendent EO 13423**

“It’s come to my attention that some of you haven’t taken the opportunity to read EO 13423 yet, so we’re going to take a few minutes today to talk about this and see what you’re going to do about it.”

- Section assignments: Give each Chief one short section or subsection. Give two subsections to each team.
- Have squad read over their section of EO 13423, then present the following to the squad (give only 3-5 minutes to prepare):
  - Summary of what they read
  - Description of how it impacts their division in general and budget specifically
  - Examples of how they plan to be compliant
- Discuss results and evaluate proposed compliance

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<tr>
<td>SEOT Superintendent EO 13423</td>
<td>Activity/Discussion</td>
<td>45 min.</td>
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**Teresa Dickinson Solid Waste Reduction**

“The second order of business is solid waste reduction. Last year, disposal costs increased significantly because of state mandated increases, so I’ve invited Teresa Dickinson, Chief of Maintenance at PRWI, here to give us presentation about reducing solid waste.”

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<tr>
<td>Teresa Dickinson Solid Waste Reduction</td>
<td>Presentation</td>
<td>20 min.</td>
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| **ADA PMIS Project Assignment**  
“The last item for the meeting is ADA compliance. Chief of Maint., this is your hot potato. The region has been hit for a number of years on ADA compliance, Golden Gate is being sued and the PWR RD is on the hot seat about this. So far I haven’t seen anything done about it here. Well, this morning I got a call from Mr. Nathan Williams (our local congressman) whose mother is in a wheel chair and who complained to her dear son about how she was being discriminated against because she couldn’t get around to most of the park. We have to show them that we’re trying to do something about this, so Chief, make sure you have an ADA Project for next year.”  
- Leave time to answer student questions | Lecture | 10 min. |
SESSION TITLE: Leadership Strategies and Skills – Part One

INSTRUCTORS/SPEAKERS: Steve Wolter

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:

TRAINING AIDS: PPT

HANDOUTS: The Leadership Experience

FACILITATOR NOTES: The flow of the session should be as follows:

POINTS TO REMEMBER:
- Manager-Employee contract
- SEOT API leaderless exercise
- Difference between groups and teams
- Interdependence
- Team effectiveness v. team cohesiveness
- Team leadership roles
- Toolkit conflict quiz
- Social value systems
- Power and influence
- Politics
- Making strategic decisions
- Culture
- Ceremony, story, and symbol
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</table>
SESSION TITLE: Health, Wellness, and Stress Management

INSTRUCTORS/SPEAKERS: Peggy Buchanan, M.A.

SESSION LENGTH: 1 hour, 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Define health, wellness, and stress management from their own perspective
- Describe how personal health and wellness relates to successful leadership
- Recognize the biological and psychological relationship between physical health and stress management
- Recognize the importance of stress management in the quality of one’s life
- List realistic ways one may enhance his or her physical health and manage stress

TRAINING AIDS:
- TBA

HANDOUTS:
- TBA

FACILITATOR NOTES:

POINTS TO REMEMBER:
INTRODUCTION:

*Steve Wolter*

Training takes its toll on everyone, and if you’re not healthy, you’re not working well. Therefore, it’s not only in your best interest to stay healthy, it’s in everyone’s best interest. Peggy Buchanan is here to give you some information about health and wellness and some tips on how you can stay healthy. She is an author and leader in the fitness industry and was selected as “Fitness Instructor of the Year” in 1997 by IDEA, the world’s largest health and fitness association. What she has to say won’t just help you in the short term of this training, but can improve your life afterwards.

**CONTENT:**

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<tbody>
<tr>
<td>Peggy Buchanan, M.A.</td>
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</table>
SESSION TITLE: Leadership Strategies and Skills – Part Two

INSTRUCTORS/SPEAKERS: Steve Wolter

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:

TRAINING AIDS:
- PPT

HANDOUTS:
- The Leadership Experience

FACILITATOR NOTES: The flow of the session should be as follows:

POINTS TO REMEMBER:
- Manager-Employee contract
- SEOT API leaderless exercise
- Difference between groups and teams
- Interdependence
- Team effectiveness v. team cohesiveness
- Team leadership roles
- Toolkit conflict quiz
- Social value systems
- Power and influence
- Politics
- Making strategic decisions
- Culture
- Ceremony, story, and symbol
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</table>
SESSION TITLE: One-Minute Paper and Instructor Evaluation

INSTRUCTORS/SPEAKERS: Course Coordinators

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluations
  - Teresa Dickinson
  - Steve Wolter
  - Peggy Buchanan

FACILITATOR NOTES: This session serves multiple purposes. It:
- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students’ learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework for the next day.
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<tbody>
<tr>
<td><strong>Course Coordinators</strong>&lt;br&gt;<strong>One-Minute Paper</strong>&lt;br&gt;Introduce activity and purpose. Give one minute to jot down ideas about:&lt;br&gt;• Most important information from the morning?&lt;br&gt;• Unclear information?&lt;br&gt;• What else do you most need to learn?</td>
<td>One-Minute Paper Handout</td>
<td>10 min.</td>
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</table>

Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.

| **Group Discussion**<br>• Ask for responses – Spend most time on q’s 2 & 3.<br>• Clarify the unclear; write key answers (esp. to q’s 2 and 3) on flipchart to refer to throughout afternoon | Discussion | 15 min. |

| **Review Course Objectives, Homework, and What to Expect**<br>• Review course content accomplished.<br>• Review what objectives will be met tomorrow. | Presentation | 5 min. |
DAY SEVEN
TUESDAY, OCTOBER 28, 2008

SESSION TITLE: One-minute paper review & Announcements

INSTRUCTORS/SPEAKERS: Course Coordinators

TRAINING AIDS:

HANDOUTS:

FACILITATOR NOTES/DIRECTIONS:

POINTS TO REMEMBER:
• Provide students with the opportunity to clarify any aspects of previous day that were unclear, as per one-minute paper.

ANNOUNCEMENTS
• Review daily agenda
• Tonight, evening social with mentors at the hotel
• Field experience is tomorrow morning (suggested dress, meeting location, etc.)
  • After field experience students will meet mentors for lunch—Location can be determined by individuals
• Dress rehearsal for presentations tomorrow night
• Travel for Friday (shipping boxes and carpooling)
SESSION TITLE: Squad Meeting – Day 6: Cyclical Funding

INSTRUCTORS/SPEAKERS: Steve Wolter – Superintendent
Bill Thompson – Visiting Facility Manager from ROMO

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Identify components of total cost of ownership and life cycle costing
- Describe how cyclical funding impacts the Maintenance Division’s budget
- Apply concepts of cyclical funding to the creation of an Annual Work Plan

TRAINING AIDS:
•

HANDOUTS:
•

FACILITATOR NOTES: This session provides the students with time to:
•

POINTS TO REMEMBER:
•
INTRODUCTION:

Steve Wolter

Bill Thompson is the Facility Manager from ROMO and he’s here to talk to you about cyclical funding and its effects on facility management.

CONTENT:

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<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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<tbody>
<tr>
<td>Bill Thompson</td>
<td>Lecture</td>
<td>30 min</td>
</tr>
<tr>
<td>Cyclical Funding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The components of total cost ownership are…</td>
<td></td>
<td></td>
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<tr>
<td>• At my park, cyclical funding impacts the Maint. Div. budget by…</td>
<td></td>
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<tr>
<td>• Cyclical funding affects planning because…</td>
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</tbody>
</table>
SESSION TITLE: Writing for Impact – Part One

INSTRUCTORS/SPEAKERS: Dana Anderson

SESSION LENGTH: 2 hours, 45 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Understand effective professional writing.
- Identify additional individual skill needs to make one’s writing more effective.

TRAINING AIDS:
- 

HANDOUTS:
- 

FACILITATOR NOTES: The flow of the session should be as follows:
- Rhetoric: bringing technical readers and writers together
- Organization: Implications for clarity and style
  - Transitional words and phrases
  - Types of paragraphs
  - Grammar
- Writing with different kinds of reading in mind

POINTS TO REMEMBER:
- 

INTRODUCTION:

*Steve Wolter*

You have only one session today, but it’s a long and vital one. Writing has become one of the most significant skills in the Facility Management Division. If you can’t communicate with your administration, you’re going to have problems. If you can’t write a good PMIS statement, your project won’t get funded. Dana Anderson has a PhD from Penn State and is currently a professor at IU, teaching rhetoric and composition. He is well versed in your specific writing needs as a facility manager; for example, in past years when the NPS was going through the PAMP development process Dr. Anderson taught writing geared toward the PAMP. We have brought him here to SEOT to help develop your writing skills a little, especially in regard to the briefing statements that you’ll be submitting with your annual work plan.

CONTENT:

[Dana Anderson provides his own content]
SESSION TITLE: Writing for Impact – Part Two

INSTRUCTORS/SPEAKERS: Dana Anderson

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:
- Be introduced to effective professional writing.
- Identify additional individual skill needs to make one’s writing more effective.

TRAINING AIDS:
- 

HANDOUTS:
- 

FACILITATOR NOTES: The flow of the session should be as follows:
- Rhetoric: bringing technical readers and writers together
- Organization: Implications for clarity and style
  - Transitional words and phrases
  - Types of paragraphs
  - Grammar
- Writing with different kinds of reading in mind

POINTS TO REMEMBER:
- 

SESSION TITLE: Sustainability Policy and Regulations

INSTRUCTORS/SPEAKERS: Shawn Norton

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:

- Understand the magnitude of the rules and regulations affecting the facility function in the environmental arena and know how to locate the policies, rules and regulations.
- Appreciate the liability associated with non-compliance.
- See beyond the consequences to the opportunities (sustainability).
- Understand the driving forces behind the sustainable movement (Executive Order, DOI and NPS Initiatives, etc.)
- Articulate the key principles of Environmental Leadership
- Appreciate the value and importance of incorporating best practices into their park management actions.

TRAINING AIDS:

- Web access to display on-line resources
- Web Sites
  - http://www.nps.gov/climatefriendlyparks/
  - http://www.nature.nps.gov/sustainability/
  - http://www.doi.gov/greening/
  - http://www1.eere.energy.gov/femp/about/index.html (FEMP)
  - http://www.usgbc.org/
  - http://www.nps.gov/renew/ [Is Kent still keeping this current?]

HANDOUTS:

- PWR’s FM Compliance Guide
- Handout – Sustainability News
- Best Practice: “Continuous Improvement Key to College’s Sustainability Efforts” (http://www.facilitiesnet.com/bom/article.asp?id=7360&keywords=sustainability)

FACILITATOR NOTES: This session should flow as follows:

- Provide an overview of facility manager competencies as they relate to sustainability issues. Then introduce rules and regulations that affect sustainability decision-making, and the consequences of noncompliance. Share the tools and concepts that will assist accomplishing sustainability goals.
POINTS TO REMEMBER:
- Sustainability, Carbon Neutral Operations, Greening of the Government and Global warming are hot topics. All are driving rapidly evolving technology and generating new opportunities. To succeed it is vital to stay abreast of developments.
INTRODUCTION:

Steve Wolter

Adopting sustainability practices isn’t just a nice idea, it’s mandated. Years ago SEOT was progressive in the field, but because of poor planning and short-term, reactive decisions it has slipped into the dark ages. Shawn Norton from WASO is here to update you on current sustainability policies and regulations to bring SEOT back up where it needs to be.

CONTENT:

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<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
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</thead>
<tbody>
<tr>
<td>Shawn Norton Facility Manager Competencies – reflective tool</td>
<td>PPT Presentation</td>
<td>10 min</td>
</tr>
</tbody>
</table>

Ask students to take out their copy of the competencies, and follow along.

Resource Stewardship, Environmental Leadership, Tasks, conditions and criteria
- Promote a climate of environmental leadership within the park unit
- Build knowledge and use of proven sustainable practices for conserving energy and other resources through facility management.
- Introduce the use of proven sustainable practices into planning, design, construction, and rehabilitation.
- Integrate sustainable practices into operations and maintenance.

Briefly mention the power of reflective learning to set goals for self development.

Rules and Regulations (RCRA, CERCLA, OSHA, etc.)
- Overview of environmental rules that affect facility operations.
- Liability considerations - Ignorance does not equal innocence.
<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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</thead>
<tbody>
<tr>
<td><strong>Systems for managing environmental performance</strong></td>
<td>PPT Presentation, Discussion</td>
<td>15</td>
</tr>
<tr>
<td>• Environmental Auditing</td>
<td></td>
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<tr>
<td>• Environmental Management Program (CoEMP)</td>
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<tr>
<td>• Environmental Management Systems (EMS)</td>
<td></td>
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<tr>
<td>• Environmental, Safety and Health Audit (ESH)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>How Do I Get There</strong></td>
<td>PPT Presentation, Discussion</td>
<td>15</td>
</tr>
<tr>
<td>• Resources to turn to improve environmental performance.</td>
<td></td>
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<tr>
<td>• Resources for sustainability.</td>
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</tr>
<tr>
<td><strong>Why Go Green</strong></td>
<td>PPT Presentation, Discussion</td>
<td>30</td>
</tr>
<tr>
<td>• What is Environmental Leadership?</td>
<td></td>
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<tr>
<td>• What are the drivers for sustainability in the federal sector?</td>
<td></td>
<td></td>
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<tr>
<td>• What are the challenges?</td>
<td></td>
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<tr>
<td>• Climate Change</td>
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<tr>
<td>• Climate Friendly Parks (CFP) Program</td>
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</tr>
<tr>
<td><strong>Conclusion</strong></td>
<td>Presentation</td>
<td>5 min</td>
</tr>
<tr>
<td>The student should be able to</td>
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<tr>
<td>• List the key environmental compliance requirements for facilities.</td>
<td></td>
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<tr>
<td>• List the drivers for better environmental performance and key systems to achieve these improvements.</td>
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</tbody>
</table>
SESSION TITLE: One-Minute Paper and Instructor Evaluation

INSTRUCTORS/SPEAKERS: Zach Carnagey

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluations
  - Bill Thompson
  - Dana Anderson

FACILITATOR NOTES: This session serves multiple purposes. It:
- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students’ learning.
- Remind students that tomorrow they will not be in the simulation.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
## CONTENT:

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<tbody>
<tr>
<td><strong>Course Coordinators</strong></td>
<td>One-Minute Paper Handout</td>
<td>10 min.</td>
</tr>
<tr>
<td><strong>One-Minute Paper</strong></td>
<td></td>
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<tr>
<td>Introduce activity and purpose. Give one minute to jot down ideas about:</td>
<td></td>
<td></td>
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<tr>
<td>• Most important information from the morning?</td>
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<tr>
<td>• Unclear information?</td>
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<tr>
<td>• What else do you most need to learn?</td>
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<td>Collect one-minute papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.</td>
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<tr>
<td><strong>Group Discussion</strong></td>
<td>Discussion</td>
<td>15 min.</td>
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<tr>
<td>• Ask for responses – Spend most time on q’s 2 &amp; 3.</td>
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<td>• Clarify the unclear; write key answers (esp. to q’s 2 and 3) on flipchart to refer to throughout afternoon</td>
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<tr>
<td><strong>Review Course Objectives, Homework, and What to Expect</strong></td>
<td>Presentation</td>
<td>5 min.</td>
</tr>
<tr>
<td>• Review course content accomplished.</td>
<td></td>
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<tr>
<td>• Review what objectives will be met tomorrow.</td>
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<tr>
<td>• Remind the students that after their lunch with the mentors, they will be writing an in-class reflective analysis essay. You will be asked to answer one of two questions:</td>
<td></td>
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</tr>
<tr>
<td>1) What three issues presented during this field trip are similar to issues in your park and how do you handle them differently?</td>
<td></td>
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<tr>
<td>2) What three issues are different from your Park? What are your ideas on how two of these issues could be handled differently?</td>
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<tr>
<td>• Explain quickly essay writing</td>
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DAY EIGHT
WEDNESDAY, OCTOBER 29, 2008

SESSION TITLE: Santa Monica NRA Field Experience

INSTRUCTORS/SPEAKERS: Jeri Mihalic, Christy McCormick

SESSION LENGTH: 5 hours

OBJECTIVES: At the end of this session, students should be able to:

- Compare actual park operations to conceptual facility management standards, understanding how conceptual information is used, modified, and/or rejected in the park setting.
- Determine how SAMO uses asset management data to drive decisions and prioritize work.
- Develop an understanding of how facility managers at SAMO work with natural and cultural resource management in park operations, park management, and overall resource protection at the park.
- Actively relate and compare work planning, extended logistics, equipment, employee qualifications, work tracking, work evaluation, and safety and risk management at SAMO to other park settings.

TRAINING AIDS:
- SAMO Unigrid
- SAMO Newsletter or other printed material

HANDOUTS:
- SAMO Scatter Plot
- Executive Summary of SAMO GMP – For use in completing homework assignment
- Homework: Exploratory paper on Facility Management at SAMO and its support of Cultural and Natural Resource Management

FACILITATOR NOTES:
There are many reasons for the development of the field experience at SAMO. The reasons for this field exercise are as follows:

- Provide students with the chance to explore SAMO through the eyes of facility managers.
- Give an overview of SAMO asset portfolio while highlighting key projects and assets of interest to the park and the visitor and allow students to see how SAMO uses data to drive asset management decisions and what the implications of these decisions are.
- Discuss how natural and cultural resources issues impact facility management.

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## CONTENT/FIELD EXERCISE SCHEDULE:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
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<tbody>
<tr>
<td>Stop 1: In Class</td>
<td>Presentation, Question and Answer</td>
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<td>Time:</td>
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<tr>
<td>Topics:</td>
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<tr>
<td>In Class (cont.)</td>
<td>Presentation</td>
<td>min.</td>
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<td>Time:</td>
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<tr>
<td>Topics:</td>
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<tr>
<td>Stop 2:</td>
<td>Presentation</td>
<td>min.</td>
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<td>Time:</td>
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<tr>
<td>Topics:</td>
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<tr>
<td>Stop 3:</td>
<td>Presentation</td>
<td></td>
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<tr>
<td>Time:</td>
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<tr>
<td>Topics:</td>
<td></td>
<td></td>
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<tr>
<td>Stop 4: Time:</td>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>Topics:</td>
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<tr>
<td>Stop 5:</td>
<td>Presentation</td>
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</table>
SESSION TITLE: Mentor Workshop

INSTRUCTORS/SPEAKERS: Betsy Dodson, Steve Wolter

SESSION LENGTH: 4 hours

OBJECTIVES: At the end of this session, mentors should be able to:
- Discuss mentoring competencies and application to mentor’s supervision responsibilities in current position
- Develop a strategy for reviewing and updating protégé’s Individual Development Plan (IDP), Self-Assessment
- Analyze what worked and did not work in DLS #1, identifying workable solutions for problems
- Review SEOT simulation and understand mentor role
- Review Capstone in Facility Management course

TRAINING AIDS:
- Flipchart
- PowerPoint

HANDOUTS:
- Student Workbooks for AFMP
- Mentor Competency and Functions
- Facility Management Competencies (they should bring them with them)
- Grading Criteria for SEOT
- Sticky notes

FACILITATOR NOTES: This session:
- Is balanced between lecture format and collaborative learning.
- The atmosphere should be kept casual and all topics should be open for discussion; a Socratic method is the most desirable approach

POINTS TO REMEMBER:
- Peer learning should be taking place during this session
- The mentor assessments should be collected at the end, and will be returned later in the week.
## CONTENT:

<table>
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<tr>
<th>CONTENT</th>
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</thead>
</table>
| Betsy Dodson  
Welcome and Thanks | Lecture | 10 min |
| Steve Wolter  
**Mentoring Competencies**  
- Taking stock of where we are and if it is where you want to be  
- Review Competencies  
  - Understand the Mentoring Role  
  - Initiate the Relationship  
  - Establish a climate of peer support  
  - Model reflective practices  
  - Apply and share effective practices  
  - Embrace mentoring as investment | Handout  
Lecture w/PPT | 60 min |
| Betsy Dodson  
**Mentor Self-Assessment**  
- Quote to start activity  
- Explain purpose of self-assessment  
  - Research-evaluation for program managers  
  - Course correction for mentor-protégé relationship  
- Review confidentiality of assessment  
  - Gathered to collect data  
  - Returned to mentors for possible future use  
- Suggest assessment can be basis for discussion with student protégés later in week  
- Administer self-assessment and collect them from mentors | Lecture | 5 min  
Assessment activity | 10 min |
<table>
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<tr>
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</thead>
</table>
| **Steve Wolter**  
Peer Learning Concepts/Flipchart Activity  
- Opportunity for mentors to teach and learn from each other  
- Different from teacher-student interaction (less formal)  
- Provides authenticity to what is learned  
- Introduce Flipchart Activity  
- Ask mentors to reflect and take notes on large stickies first | Lecture | 5 min |
| **Steve Wolter**  
Flipchart Activity  
- Ask mentors to go around the room and place stickies on appropriate charts | Flipchart | 10 min. |
| **Identifying Workable Solutions**  
- Split group into three groups and give each group two of the flip charts.  
- Ask them to identify workable solutions and record on a flipchart | Small group work Report out | 10 min. |
| **Debrief**  
- Discuss the feasibility of the solutions identified  
- Record information with a promise to send out later | Debrief | 15 min |
| **Betsy Dodson**  
Protégé Self-Assessment, IDP and RDA: Planning with your Protégé  
- Reevaluate Self-Assessment  
- IDP should include classes and other developmental assignments – it does not need to identify required courses from the FMLP curriculum  
- Share Developmental Assignment Rubric | Lecture, PPT Group Discussion | 60 min. |
<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Betsy Dodson</strong></td>
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</tr>
<tr>
<td><strong>SEOT Simulation</strong></td>
<td>Lecture</td>
<td>10 min</td>
</tr>
<tr>
<td>• Process - What is a simulation</td>
<td></td>
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<tr>
<td>• Mentor Role</td>
<td></td>
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<tr>
<td>• Rubrics (Oral Presentation Rubric, LCBP I, II, III skills, Other Competencies Measured, Rubric, Self and Team Assessment) - How to coach for grading</td>
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<tr>
<td>• Dress Rehearsal</td>
<td></td>
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<tr>
<td><strong>Steve Wolter</strong></td>
<td></td>
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<tr>
<td><strong>The Final Stretch</strong></td>
<td>Lecture</td>
<td>10 min</td>
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<tr>
<td>• Keeping the Drive Alive</td>
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<tr>
<td>• Capstone Planning</td>
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<tr>
<td>• Final Questions/Concerns</td>
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</table>
What I Learned from my Protégé (flipcharts)

What worked and what didn’t work in our communication strategy
What worked and what didn’t work in document and work review
What worked and what didn’t work about the e-portfolio
What worked and what didn’t work about your protégé’s developmental activity
What worked and what didn’t work about monthly Breeze Sessions or Discussion Boards
SESSION TITLE: Mentor/Student Lunch

INSTRUCTORS/SPEAKERS: Course Coordinators, Mentors, and Students

SESSION LENGTH: 1 hour, 15 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Provide an update of the DLS #1 period.
- Update IDP and Self-Assessment as a result of Principles of Asset Management and DLS #1 Period.

TRAINING AIDS:
- Facility Manager Competencies document

HANDOUTS:
- Self-Assessment form – Original from Principles of Asset Management and a clean one
- Individual Development Plan (IDP) – Original from Principles of Asset Management and a clean one

FACILITATOR NOTES: This session:
- Should reinforce the overall goals of the mentoring program
- Will allow the participants and mentors an opportunity to meet and discuss communication plans and what can be improved upon for Interim #2

POINTS TO REMEMBER:
- Timing should be flexible on this session.
- The mentors and protégés may wish to meet informally outside of the classroom.
### CONTENT:

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<tbody>
<tr>
<td>Course Coordinators</td>
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</tr>
<tr>
<td>Ask for Feedback on DLS #1: Lessons Learned</td>
<td></td>
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<tr>
<td>• What worked? What didn’t? What can be improved upon in DLS#2?</td>
<td>Paired Meetings</td>
<td>1 hr., 15 min.</td>
</tr>
<tr>
<td>Mentor-Student Communication</td>
<td></td>
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<tr>
<td>How did your communication plan work out?</td>
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<tr>
<td>• Reiterate importance of communication in DLS #2</td>
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<tr>
<td>• DLS #2 is a time when students and mentors need to work as closely as possible to ensure tasks are being completed, projects are up to par, and students have a resource / go-to person with subject matter expertise.</td>
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<tr>
<td>Mentor/Student Meetings</td>
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<tr>
<td>First, review Interim #1 activities and original self-assessment and IDP.</td>
<td></td>
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<tr>
<td>• Make any changes to self-assessment. IDP will be developed anew for DLS#2</td>
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</tbody>
</table>
SESSION TITLE: Reflective Analytic Essay

INSTRUCTORS/SPEAKERS: Christy McCormick

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Complete an essay in blue book format describing one aspect of the field trip to Santa Monica Mountains

TRAINING AIDS:
- None

HANDOUTS:
- Blue Books

FACILITATOR NOTES:

POINTS TO REMEMBER:
- Remind the students they have 30 minutes to answer one of the questions they were given yesterday
- Ask them to clear their desks of all materials
- Remind them to spend some time outlining their thoughts and ideas before actually writing
SESSION TITLE: Distributed Learning Session #2 Planning

INSTRUCTORS/SPEAKERS: Christy McCormick, Amy Gregor

SESSION LENGTH: 1 hour, 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Articulate their responsibilities for the DLS #2
- Understand the logistics of travel during DLS #2
- Have the opportunity to provide feedback to the course coordinators.

TRAINING AIDS:
- None

HANDOUTS:
- DLS #2 Materials
  - Syllabus
  - Schedule
  - Calendar
  - Assignments and Assignment Descriptions
  - List of Annual Work Group Parks, Group Assignments, and Contact Information

FACILITATOR NOTES: The main purposes of this session are:
- To provide information and materials for DLS #2
- To provide students with next steps logistics.

POINTS TO REMEMBER:
- This should be a celebration of completion of the first half of the FMLP, but it should also build the idea that the students are at the mid-point of their course of study. They still have a number of tasks to accomplish before the end, but they will have many amazing experiences over the next six months if they approach it with interest, perseverance, and effort.
- Remind them that they have a support system available to them; if at any time they need help with something, they have a network of people with whom they can talk, including the other students, their mentors, the course coordinators and managers, and the Eppley Institute staff. We are pulling for their success in this program.
<table>
<thead>
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<tbody>
<tr>
<td><strong>Christy McCormick</strong></td>
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</tr>
<tr>
<td><strong>DLS #2 Planning</strong></td>
<td>Presentation, Discussion</td>
<td>1 hr.</td>
</tr>
<tr>
<td>• What to expect for your Team trip to park to develop annual work plan</td>
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<tr>
<td>• RDA #2 Planning to make the most of it</td>
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<tr>
<td>• What to expect in the Capstone Class; beginning development of your portfolio.</td>
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<tr>
<td><strong>Christy McCormick</strong></td>
<td></td>
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<tr>
<td><strong>Capstone Course of Study in Facility Management Planning</strong></td>
<td></td>
<td>30 min.</td>
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</tbody>
</table>
SESSION TITLE: One-Minute Paper and Conclusion of Day

INSTRUCTORS/SPEAKERS: Course Coordinators

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- List the most important and most unclear information they have received from the day’s sessions.
- Clarify their needs by providing instructors with additional information they want from the course.
- Review course objectives met during the day and what to expect the next day.
- Understand what their homework assignments are for the evening.

TRAINING AIDS:
- Flipchart

HANDOUTS:
- One-Minute Paper handout
- Instructor Evaluations-
  - Christy McCormick
  - Amy Gregor
  - Betsy Dodson (for Mentors)
  - Steve Wolter (for Mentors)

FACILITATOR NOTES: This session serves multiple purposes. It:
- Helps learners to reflect on and reinforce information from the first objective.
- Provides chance to clarify information, ensure objectives are being met, and shape future session content if necessary.
- Gives instructors a chance for informal evaluation of students’ learning.

POINTS TO REMEMBER: While this session will serve as an evaluation of the day’s events and provide feedback to the facilitators, it also should be used to review and reinforce the course content learned.
- Facilitators should provide a brief synopsis of what will be covered the next day.
- Facilitators will reiterate the homework for the next day.
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<tr>
<td>• Review course content accomplished.</td>
<td></td>
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<tr>
<td>• Review what objectives will be met tomorrow.</td>
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<tr>
<td>• Review all homework tasks.</td>
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<tr>
<td>• Assure annual work plan is in electronic format tomorrow morning before presentations.</td>
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</table>
SESSION TITLE: SEOT Presentation Dress Rehearsal

INSTRUCTORS/SPEAKERS: Student Groups and Mentors

SESSION LENGTH: 2 hours

OBJECTIVES: At the end of this session, students should be able to:
- Incorporate feedback from the mentors regarding their student SEOT presentations.
- Refine their presentations based on the dress rehearsal.

TRAINING AIDS:
- SEOT documents

HANDOUTS:
- Grading Criteria for SEOT

FACILITATOR NOTES: This session serves multiple purposes. It:
- Provides the interaction time with students and mentors.
- Allows the students to practice their presentations for the mentors and make the necessary modifications based on their feedback.

POINTS TO REMEMBER:
- While the mentors are there to provide feedback, they should not DO any of the work for the students.
- The mentors should be reminded about basic principles of giving feedback.
- The mentors should be mindful of the time.
### CONTENT:

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
<th>TIME</th>
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<tbody>
<tr>
<td>Students and Mentors</td>
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<tr>
<td>Presentation Dress Rehearsal</td>
<td>Small Group Work</td>
<td>90 min</td>
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</table>

Student groups will rehearse their SEOT Presentations for their mentors.

- Mentors will be provided with the grading criteria for the SEOT presentations. They should also have reviewed SEOT information prior to the course to become familiar with the tasks their students are expected to accomplish during the course.
- Time should be allowed to provide feedback and work on modifications to the presentation.
DAY NINE
THURSDAY, OCTOBER 30, 2008

SESSION TITLE: Group SEOT Annual Work Plan Presentations

INSTRUCTORS/SPEAKERS: Course Coordinators, Students
Evaluators: Ed Walls, Jack Williams, Steve Wolter, Christy McCormick

SESSION LENGTH: Roughly five hours (see timing below)

OBJECTIVES: At the end of this session, students should be able to:
- Explain applications of life cycle business practices as they apply to SEOT simulation.

TRAINING AIDS:
- None

HANDOUTS:
- Presentation Evaluations

FACILITATOR NOTES: The main purposes of this session are:
- To serve as a culmination of principles learned in Life Cycle Management.
- To apply critical thinking skills in the analysis of the simulation.
- To demonstrate teamwork skills in the presentation.

Each student group will have 30 minutes to present and 15 minutes to answer questions from the mentors, instructors, and students. The 15-minute period should also include some consequence analysis from the SME group. The course coordinators will have to facilitate the timing of each group very closely to ensure all groups have an equal amount of time in which to present their findings. The session and presentations will flow as follows:

Group #1
- 8:00-8:30 am – Student Presentation
- 8:30-8:45 am – Question and Answer Period
- 8:45-9:00 am – Break and Prep for Next Group

Group #2
- 9:00-9:30 am – Student Presentation
- 9:30-9:45 am – Question and Answer Period
- 9:45-10:00 am – Break and Prep for Next Group

Group #3
- 10:00-10:30 am – Student Presentation
- 10:30-10:45 am – Question and Answer Period
• 10:45-11:00 am – Break and Prep for Next Group

Group #4
• 11:00-11:30 am – Student Presentation
• 11:30-11:45 am – Question and Answer Period
• 11:45 am-12:00 pm – Break and Lunch

Group #5
• 1:00-1:30 pm – Student Presentation
• 1:30-1:45 pm – Question and Answer Period
• 1:45-2:00 pm – Break

Group #6
• 2:00-2:30 pm – Student Presentation
• 2:30-2:45 pm – Question and Answer Period
• 2:45-3:00 pm – Break

POINTS TO REMEMBER:
• The groups must stay within the prescribed timeframe.
• The evaluation team should be able to provide a brief consequence analysis.
• Remind the students to hold all questions until the end of the session
## CONTENT:

<table>
<thead>
<tr>
<th>Group #1</th>
<th>Student Presentation (30 min.)</th>
<th>Group Presentations</th>
<th>1 hr.</th>
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<tbody>
<tr>
<td></td>
<td>Question and Answer/Consequence Analysis (15 min.)</td>
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<td>Break (15 min.)</td>
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<tr>
<th>Group #2</th>
<th>Student Presentation (30 min.)</th>
<th>Group Presentations</th>
<th>1 hr.</th>
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<td></td>
<td>Question and Answer/Consequence Analysis (15 min.)</td>
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<td>Break (15 min.)</td>
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<tr>
<th>Group #3</th>
<th>Student Presentation (30 min.)</th>
<th>Group Presentations</th>
<th>1 hr.</th>
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<tr>
<td></td>
<td>Question and Answer/Consequence Analysis (15 min.)</td>
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<td>Break (15 min.)</td>
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<tr>
<th>Group #4</th>
<th>Student Presentation (30 min.)</th>
<th>Group Presentations</th>
<th>1 hr.</th>
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<tr>
<td></td>
<td>Question and Answer/Consequence Analysis (15 min.)</td>
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<td></td>
<td>Break (15 min.)</td>
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| Lunch | | Group Presentations | 1 hr. |
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<tr>
<th>Group #5</th>
<th>Student Presentation (30 min.)</th>
<th>Group Presentations</th>
<th>1 hr.</th>
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<td></td>
<td>Question and Answer/Consequence Analysis (15 min.)</td>
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<td>Break (15 min.)</td>
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<tr>
<td>Group #6</td>
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<tr>
<td><strong>Student Presentation</strong> (30 min.)</td>
<td>Group Presentations</td>
<td>1 hr.</td>
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<tr>
<td><strong>Question and Answer/Consequence Analysis</strong></td>
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<td>(15 min.)</td>
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<tr>
<td><strong>Break</strong> (15 min.)</td>
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SESSION TITLE: Course Conclusion

INSTRUCTORS/SPEAKERS: Course Coordinators, Steve Wolter

SESSION LENGTH: 30 minutes

OBJECTIVES: At the end of this session, students should be able to:
- Complete course and instructor evaluations.
- Receive course completion certificates.

TRAINING AIDS:
- None

HANDOUTS:
- Course Evaluations
- Team Evaluations
- Continuing Education Unit (CEU) Certificates

FACILITATOR NOTES: This session serves multiple purposes. It:
- Should allow students to provide written anonymous feedback.
- Recognize students for successful completion of the course.
- We want their feedback. Collect the evaluations they have been filling out and ask them to fill out the final course evaluation.
**CONTENT:**

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>METHOD</th>
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<tbody>
<tr>
<td><strong>Course Coordinators</strong></td>
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<tr>
<td><strong>Provide Course Summary and Evaluation</strong></td>
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<tr>
<td>Course Conclusion/Course Evaluation</td>
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</tr>
<tr>
<td>• Thank students for participation.</td>
<td>Course Eval., Mentor Eval.</td>
<td>15 min.</td>
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<tr>
<td>• Hand out course evaluations and mentor workshop evaluations.</td>
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<tr>
<td>• Allow the students and mentors 15 minutes to complete course and instructor evaluations and turn them in.</td>
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<tr>
<td><strong>Betsy Dodson, Steve Wolter</strong></td>
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<tr>
<td><strong>Lead Discussion and Question/Answer Period</strong></td>
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<tr>
<td>Solicit further questions, observations, issues from group.</td>
<td>Discussion, CEU Certificates</td>
<td>15 min.</td>
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<tr>
<td>• Ask for feedback and any questions from the group.</td>
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<tr>
<td>• Hand out CEU certificates</td>
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Chapter 2
Instructional Methods
INSTRUCTIONAL METHODS

This course incorporates a number of instructional methods which have been designed to:
- Stimulate learner interest
- Facilitate the transfer of learning
- Appeal to various learning styles

You should familiarize yourself with the various instructional methods in order to make them the most effective. A brief outline of instructional techniques appears below. Case studies are also used in this course. If one of your sessions includes a case study or group work, please read the information presented at the end of this section.

**Behavior Modeling** - A technique in which effective behaviors are shown to the trainees with an outline of how to repeat the behavior step-by-step. The trainees try out and practice the behavior with guidance and feedback. Used commonly in interpersonal skills and communication training.

**Brainstorming** - An idea-generating process in which a spontaneous, non-judgmental flow of suggestions is facilitated. Later, the ideas are explored in detail and their usefulness evaluated.

**Critical Incident** - A variation of the case study in which trainees are given incomplete data. By analyzing the case and asking the right questions, they are given additional data needed to solve the case.

**Critique** - Students are asked to analyze the strengths and weaknesses of a particular process and make suggestions for improvements

**Demonstration** - The use of media, such as the internet or a simulation, to demonstrate concepts, applications, and ideas.

**Discussion** - An exchange of ideas between the facilitator and the trainees. It can be largely spontaneous, but it usually requires some structure to achieve a content-related purpose.

**Facilitated Discussion** - A facilitated discussion is a multi-person conversation, in which people exchange ideas about a particular, pre-negotiated topic. Facilitators start the discussion, keep a speaker’s list when necessary, and make sure that everyone stays on topic.

**Field Exercise** - The application of a classroom concept to a real-life situation.

**Game** - A structured exercise in which competition or cooperation (or both) are used to practice principles or learn new ones.

**Interview** - Students question a resource person to add to content knowledge or develop new approaches.
Job-aids - Items given to a student to assist them in doing their jobs. They might include: worksheets, checklists, samples, flow-charts, procedural guides, glossaries, diagrams, decision tables, manuals, etc.

Lecture - A prepared oral presentation by a qualified speaker.

Nominal Group Technique - A method in which the class is divided into groups and each group follows the same process: generate ideas, record ideas, discuss ideas, and vote on ideas.

One-on-One discussion - A method in which the students are asked to speak to the person beside them for a few minutes to discuss an issue, answer a question, or generate questions to ask.

Panel - A discussion among a group of experts that takes place while students observe.

Reflection - Students are given time for individual thought to consider what has been learned and its applicability to work settings. Works well in e-course development.

Small Group Work – In a cooperative learning environment, students work together to exchange ideas, make plans, and propose solutions.

Video Clips - Segments of moving video images that are isolated and usually inserted in a presentation or multimedia document.

Each session should be completed with a debrief of the activities and information provided. This will help reiterate the key points of each session and serve as a transition between the different course sessions.
Using Case Studies to Teach Real-Life Ideas

What is a Case Study?
Case studies are stories that are used to help learners understand an educational message or concept. They describe either real or believable current problems in which individuals must make decisions. By telling a story, case studies personalize the issue and help relate concepts to the learners’ experiences. To make the learner feel the problem is relevant to his or her life, case studies should include current problems or issues.

A good case study:
- Mirrors real-life situations or describes current, actual problems.
- Forces the learners to consider and analyze complex situations.
- Allows learners to consider the complexity of the problem-solving processes required in real-life situations.
- Illustrates educational concepts using situations or problems that are relevant to the learners.
- Builds the learners’ interest and engages them in the learning experience.

Your learners should find the case studies an enjoyable experience. However, learners should understand that:

- The information provided in case studies may not include the “whole story.”
- They may need to make inferences and educated guesses when discussing case studies.
- There is no single right answer or correct solution as far as case studies are concerned. However, there are choices and the reasons behind them; the stronger the analysis conducted by the learners, the stronger the reasons behind the choices.

Serving a Learning Function
Most importantly, a good case study must serve a learning function. The instructor should ask himself or herself: What does this case study do for the course and the learner? What main points should I highlight to make it useful to the learners? In analyzing case studies, students develop skills they will use in their careers, including:

- Problem identification
- The ability to analyze and interpret information
- Thinking analytically and critically
- The ability to recognize assumptions and inferences
- Exercising judgment and decision-making skills
- Understanding interpersonal relationships
- Communicating ideas and opinions

The goal of group discussion is to analyze the problem and describe methods of solving the case study problem or issue. Learners should also focus on making plans for the future; in other words, they should respond not only with an analysis of the problem but with precise methods of solving that problem.
Why use Case Studies?
Individuals have many different learning styles which affect how well they understand and retain information. While some individuals can listen to a lecture and learn the concepts described, other individuals need to apply concepts before they can use the information. Case studies provide a way for learners to apply concepts through the use of relevant settings and stories. Case studies also require active participation; learners must analyze different aspects of the case study and verbalize their conclusions to the rest of the group.

There are many benefits to using case studies as an instructional technique. Case studies:
- Promote learning by doing.
- Help users analyze messy real-world issues in a safe, consequence-free environment.
- Develop analytical and problem-solving skills by asking learners to apply concepts. This helps learners to internalize and use these concepts in the future.
- Reach learners who may not respond to traditional teaching methods such as lectures.
- Allow for more flexible discussions. Debriefing discussions can be shaped to match the specific needs and experiences of the individual learners in the course.

How you can teach Successfully using Case Studies
Most instructors will find themselves most successful when they use the following techniques:
- Use a proper introduction to the case studies.
- Fully explain what is expected of the learners; have a clear picture of the case study objectives and be able to communicate them.
- Ask if learners need any clarification before allowing them to brainstorm with their small groups.
- Highlight the need for learners to participate equally in their small groups.
- Use directive but not dominating questions in the group debrief.
- Highlight important comments or thoughts with a flip chart.
- Provide an appropriate summary that both concludes the activity and connects it with the rest of the course.

Using Simulations to Practice Information Learned
The use of a simulation allows the learner to solve problems using simulations that represent classic problems in the area of facility management. The use of a fictitious park, Sea Otter Island, will highlight various challenges and problems that may be applied to any park. Not only will the students practice critical thinking and analytical skills, but they will also be incorporating team building and leadership skills.

A successful simulation requires:
- Complexity and the element of reality in the information provided
- Detailed plans, processes, information, and resources available to the students
- Attention paid to the Facility Manager Competencies in the design of the simulation
- A facilitation team, made up of subject matter experts in the areas of facilitation techniques, Facility Management Software System (FMSS), and general facility management
A detailed consequence analysis provided by the facilitation team following the presentation by the groups

**Successful Debriefing Techniques**

The final key to a successful case study, simulation, or small group work assignment is the debrief. It allows the student to reflect, think about what they have learned, and how they will apply it to their work.

**Tips:**
- Allow the group sufficient time to present their findings, but give them a time limit (“You will have five minutes to present.”).
- Ask open-ended questions that allow them to think critically and allow time for them to frame an answer.
- Allow the group at large to comment on what was presented.