





---

# Advanced Facility Management Practices

---

## Instructor Manual

---

October 2015

**Bob Wilbur**  
Chief  
WASO-PFMD  
National Park Service



**Mike Seibert**  
Branch Chief –  
Asset Management  
WASO-PFMD  
National Park Service

**Jenny Dems**  
Asset Management  
Training Team  
WASO-PFMD  
National Park Service

**Sandy Pusey**  
Asset Management  
Training Team  
WASO-PFMD  
National Park Service

**Mark Tezel**  
Asset Management  
Training Team  
WASO-PFMD  
National Park Service



**Christy McCormick**  
Project Team  
Eppley Institute

**Stephen A. Wolter**  
Executive Director  
Eppley Institute

**Nona Henderson**  
Project Team  
Eppley Institute

## Acknowledgements

The following individuals contributed to the course development or Instruction of the Facility Manager Leaders Program-Advanced Facility Management Practices:

### **National Park Service**

Jenny Dems  
Carl Kreshak  
Sandy Pusey  
Mike Seibert  
Carre Shandor  
Lissa Spomer  
Mark Tezel  
Richard Ullman  
Bob Wilbur

### **Eppley Institute**

Emily Davis  
Nona Henderson  
Christy McCormick  
Katy Patrick  
Matthew Rhule  
Elizabeth Sherrill  
Kate Wiltz  
Steve Wolter

### **Indiana University**

Dana Anderson

# TABLE OF CONTENTS

PREFACE .....	1
Introduction to the Course .....	2
AFMP Course Agenda for Instructors .....	6
AFMP Course Agenda for Students and Mentors .....	13
Instructional Methods .....	20
Using Case Studies to Teach Real-Life Ideas.....	22
The Simulation .....	24
WEEK ONE.....	27
Day 1: Course Introduction and Welcome to the Park .....	28
Welcome to SEOT.....	32
Superintendent Welcome Speech .....	35
Student Presentations .....	43
Leading Facility Management: Continuing the Journey to Mastering Leadership .....	45
Quick Reflection and Instructor Evaluation (Day 1) .....	46
Day 2: Good of the Day, Announcements, Squad Meeting.....	48
Introduction to Work Types and Sub-Work Types .....	49
Data-Driven Decision Making .....	53
Strengths Based Leadership .....	62
Quick Reflection and Instructor Evaluation (Day 2) .....	90
Day 3: Good of the Day and Announcements.....	92
Informal Visitor Contacts: Supporting your Employees.....	94
Asset Management Planning .....	101
Capital Investment Strategy .....	105
Project Planning .....	108
Budgeting at the High Level .....	114
Quick Reflection and Instructor Evaluation (Day 3) .....	118
Day 4: Good of the Day, Squad Meeting, Special Event .....	120
Superintendent Speech: Special Event.....	122
AWP Group Analysis & Consensus.....	124
Facility Project Development and Fund Sources .....	125
Budgeting at your Park.....	128
Quick Reflection and Instructor Evaluation (Day 4) .....	135
Day 5: Good of the Day .....	137
Shackleton Activity Answers .....	138
Field Experience .....	140

LYJO and SEOT Implications.....	141
Wellbeing and Work-Life Balance.....	142
Mentor Briefing .....	144
WEEK TWO .....	145
Day 6: Week 2 Opening and Announcements.....	146
Writing Workshop.....	148
DLS #2 Planning .....	149
How to Facilitate an API Exercise (Students).....	152
How to Facilitate an API Exercise (Mentors) .....	155
Strengths Based Leadership for Mentors (Mentor Workshop I) .....	158
Day 7: Good of the Day and Announcements.....	164
Re-Optimization Workshop.....	165
Mentoring Competencies Workshop (Mentor Workshop II).....	167
Day 8: Good of the Day and Announcements.....	174
Presenting your Annual Work Plan .....	175
Quick Reflection and Instructor Evaluation (Day 8) .....	177
SEOT Presentation Dry Run .....	179
SEOT AWP Presentations.....	180
Course Conclusion .....	183
Closing Dinner.....	185

# PREFACE

---

# INTRODUCTION TO THE COURSE

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.
- **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 four-hour session highlighting basic technical writing skills will be presented to the students.

## The Problem and Need

Over the past 40 years, the National Park Service (NPS) facility management profession has evolved into a complex, mission-critical discipline. Being a facility manager in the 21<sup>st</sup> 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.
- Revise plans through evaluation to fit within budgeted funds.
- Identify and utilize human, paper, and electronic resources to guide decision-making and planning processes.
- Analyze and evaluate data from multiple sources to inform planning and management decisions.

## Course Syllabus

This course is divided into many objectives over a two-week period. The assumption is that you will be completing pre-course work, presentations, and additional homework throughout the two weeks. Some of this will take place outside of regularly scheduled class time.

### Required Texts:

Daft, R. (2008). *The leadership experience*, 4<sup>th</sup> ed. Mason, Ohio: Thomson/South-Western.  
Rath, T., & Conchie, B. (2008). *Strengths based leadership: Great leaders, teams, and why people follow*. New York: Gallup.

## Course Assignments

Assignment Name	Points	Due Date
Pre-Course Assignment (AWP Individual Analysis)	100	Monday, October 19 <sup>th</sup> at 8 a.m.
Individual Oral Presentation	100	Sunday, October 11 <sup>th</sup> (loaded to e-portfolio site)
Midterm Exam Excel Portion	225 30	
Excel Homework	50	Wednesday, October 21 <sup>st</sup>
Critical Analysis (Group)	50	Thursday, October 22 <sup>nd</sup>
Annual Work Plan Blueprint	100	Thursday, October 22 <sup>nd</sup>
PMIS Project Development	50	Monday, October 26 <sup>th</sup>
LYJO Field Experience	50	Monday, October 26 <sup>th</sup>
API Facilitation	50	Tuesday, October 27 <sup>th</sup>
Annual Work Plan Workbook	250	Wednesday, October 28 <sup>th</sup>
Team Oral Presentation	250	Thursday, October 29 <sup>th</sup>
Class Participation	100	Thursday, October 29 <sup>th</sup>
<b>Total</b>	<b>1405</b>	

## Grading Scale

The grading scale and grades help you to track your progress throughout the course of study. In order to receive a Certificate of Completion, you must maintain a "C" or better average.

A	90 - 100%
B	80 - 90%
C	70 - 80%
D	60 - 70%
F	<60%



**Cheating and Plagiarism**

Throughout this rigorous course of study, it is expected that cheating and plagiarism will not occur in any student projects, papers, developmental activities, or other assignments.

To that end:

*A student must not adopt or reproduce ideas, words, or statements of another person without appropriate acknowledgement. A student must give credit to the originality of others and acknowledge indebtedness whenever he or she does any of the following:*

- Quotes another person's actual words, either oral or written;
- Paraphrases another person's words, either oral or written;
- Uses another person's idea, opinion, or theory; or
- Borrows facts, statistics, or other illustrative material, unless the information is common knowledge.

There are serious consequences for academic misconduct. Your instructors reserve the right to issue a low grade, a failing grade ("F"), or to refuse to accept any assignment that has been plagiarized, either in whole or in part.

The *Indiana University Academic Handbook* states that faculty members have the responsibility of fostering the "intellectual honesty as well as the intellectual development of students... Should the faculty member detect signs of plagiarism or cheating, it is his or her most serious obligation to investigate these thoroughly, to take appropriate action with respect to the grades of students, and in any event to report the matter to the Dean of Students. The necessity to report every case of cheating, whether or not further action is desirable, arises particularly because of the possibility that this is not the student's first offense, or that other offenses may follow it. Equity also demands that a uniform reporting practice be enforced; otherwise, some students will be penalized while others guilty of the same actions will go free" (p. 172).

# AFMP COURSE AGENDA FOR INSTRUCTORS

## Week 1

**Monday, October 19, 2015**

**Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 9:00 am	Course Introduction and Welcome to the Park Hand in AWP Analysis	Russ Whitlock Becca Renaud
9:00 am – 10:00 am	Welcome to SEOT	Steve Wolter
10:15 am – 12:00 pm	Student Presentations (2 groups of 8) Event Center Education Center	Students
12:00 pm – 1:00 pm	Lunch	
1:00 pm – 1:45 pm	Student Presentations Move to Event Center	Students
2:00 pm – 4:30 pm	Leadership	Wolter
4:30 pm – 5:00 pm	Quick Reflection & Instructor Evaluation Homework Assignment (AWP Analysis-Group)	Course Coordinators
Evening	(Help Desk is available)	

**Tuesday, October 20, 2015**

**Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day and Announcements (What is a Simulation?) Individual AWP Analysis Review Squad Meeting - Intro of the Management Team	Course Coordinators
8:30 am – 10:00 am	Intro to Work Types and the County Fair	Dems



10:00 am – 10:15 am	Break	
10:15 am – 12:00 pm	Data-Driven Decision Making (Part 1)	Tezel
12:00 pm – 1:30 pm	Lunch and Group Work	Students
1:30 pm – 2:30 pm	Data-Driven Decision Making (Part 2)	Pusey
2:30 pm – 5:00 pm	Strengths Based Leadership and Working in a Team Grading AWP Analysis Papers	Wolter
5:00 pm – 5:15 pm	Quick Reflection & Instructor Evaluation Excel Homework-Murder Mystery	Course Coordinators
Evening	(Help Desk is available)	

**Wednesday, October 21, 2015**  
**Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements Squad Meeting – Morning Meeting Toolkit A Part of Me	Course Coordinators
8:30 am – 10:00 am	Informal Visitor Contacts: Supporting Your Employees	Richard Ullman
10:00 am – 10:15 am	Break	
10:15 am – 11:30 am	Asset Management Planning	Mather/Jarvis
11:30 am – 1:00 pm	Lunch	
1:00 pm – 2:00 pm	Capital Investment Strategy	Tezel
2:15 pm – 3:30 pm	Project Planning	McCormick
3:30 pm – 3:45 pm	Break	
3:45 pm – 4:45 pm	Budgeting at the High Level	Spomer/Pusey
4:45 pm – 5:00 pm	Quick Reflection, Instructor Evaluation, and Homework (Project Plan-Team)	Course Coordinators

Evening (Help Desk is available)

### Thursday, October 22, 2015

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Squad Meeting - Special Event	Course Coordinators
8:30 am – 9:30 am	AWP Group Analysis & Consensus	Students
9:45 am – 11:45 am	Facility Project Development and Fund Sources	Spomer
11:45 am – 1:00 pm	Lunch	
1:00 pm – 4:00 pm	Budgeting	Pusey/Spomer
4:00 pm – 5:00 pm	Student Work Time	
5:00 pm - 5:30 pm	Quick Reflection & Instructor Evaluation Homework-PMIS Project Homework-Review of New Projects (Group)	Course Coordinators
Evening	(Help Desk is available)	

### Friday, October 23, 2015 Event Center, Johnson City

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements (Shackleton Dilemma)	Course Coordinators
8:30 am – 10:30 am	Mid-Term Exam	Course Coordinators
10:30 am – 11:00 am	Travel to Park	
11:00 am – 12:00 pm	Volunteer work at park	
12:00 pm – 1:00 pm	Lunch	
1:00 pm – 3:30 pm	Field Experience	Renaud
3:30 pm – 4:30 pm	Well-Being	Pusey/Tezel



4:30 pm – 5:00 pm	Quick Reflection & Instructor Evaluation Field Experience Homework	Course Coordinators
-------------------	---	------------------------

**Saturday, October 24, 2015**

Time	Session Title	Guest Speakers
4:00 pm – 4:30 pm	Mandatory Student Team Check-in Hampton Inn (Help Desk is available)	SEOT Chiefs

**Sunday, October 25, 2015**

Time	Session Title	Guest Speakers
9:00 am – 9:30 am	Mandatory Student Team Check-in Hampton Inn (Help Desk is available)	SEOT Chiefs
<b>4:00 pm – 5:00 pm</b>	<b>Mentor Briefing Hampton Inn</b>	<b>Course Coordinators</b>
5:00 pm – 7:00 pm	Mentor-Student Barbecue Hampton Inn	All

**Week 2****Monday, October 26, 2015****Courthouse Annex, Johnson City (students)****Event Center, Johnson City (mentors)**

Time	Session Title	Guest Speakers
7:45 am – 8:30 am	Squad Meeting - Opening of Week 2 & Announcements - Debrief Field Experience - Morning Meeting Toolkit	Students and Mentors
8:30 am – 12:30 pm	Writing Workshop	Dr. Dana Anderson
12:30 pm – 1:30 pm	Lunch	
1:30 pm – 2:30 pm	DLS#2 Planning	McCormick
2:30 pm – 3:30 pm	How to Facilitate an API How to participate in a Facilitation	Dems/McCormick Tezel/Pusey
3:30 pm – 5:30 pm	AWP Work Time (Help Desk is available) Mentor Workshop I – Strengths Based Leadership with Wolter	Tezel Wolter/Pusey
Evening	(Help Desk is available) FLAM Filming	Students Mentors

**Tuesday, October 27, 2015****Courthouse Annex (students)****Event Center (mentors)**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements Courthouse Annex	Course Coordinators
8:30 am – 9:30 am	API Facilitation 2 groups at Courthouse Annex 1 group at Event Center	Students and Mentors
9:45 am – 11:45 am	Re-Optimization Workshop Courthouse Annex Mentor Workshop II	Tezel Wolter/Pusey
12:30 pm – 1:30 pm	Lunch	
1:30 pm – 5:00 pm	AWP Work Time (Help Desk is available) Mentor Field Experience	Students Renaud/Henderson





Evening	(Help Desk is available) FLAM Filming	Students Mentors
---------	--	---------------------

**Wednesday, October 28, 2015****Courthouse Annex**

Time	Session Title	Guest Speakers
8:00 am – 8:15 am	Good of the Day & Announcements Turn in Annual Work Plan	Course Coordinators
8:15 am – 9:15 am	Squad Meeting - Federal Real Property and Reduce the Footprint	Chekan/Wolter
9:30 am – 10:30 am	PFMD Update	Wilbur
10:30 am – 2:00 pm	Lunch and Student-Mentor Meetings	Students and Mentors
2:00 pm – 3:00 pm	Presentation Planning Presentation Planning for Mentors Dress Rehearsal	Steve Wolter Course Coordinators
3:00 pm – 3:30 pm	Quick Reflection & Instructor and Course Evaluation	Course Coordinators
3:30pm – 5:00 pm	AWP Work Time	
Evening	Dress Rehearsal for Presentation (Help Desk is available)	Students/Mentors

**Thursday, October 29, 2015****Courthouse Annex**

Time	Session Title	Guest Speakers
8:00 am – 9:00 am	Individual and Group Photos Event Center	Class
9:00 am – 11:30 pm	Presentations	Students
11:30 pm – 1:00 pm	Lunch	
1:00 pm – 3:30 pm	Presentations	Students
3:30 pm – 4:30 pm	Class Conclusion	Course Coordinators

6:00 pm – 8:30 pm	Group Dinner and Close of Class Russo's
-------------------	--

**Friday, October 30, 2015**

Time	Session Title	Facilitator
7:30 am – 8:30 am	Breakfast with Mentors (Optional)	
8:30 am	Depart	
7:30 am – 12:00 pm	Debrief and Exit Interviews	



# AFMP COURSE AGENDA FOR STUDENTS AND MENTORS

---

## Week 1

**Monday, October 19, 2015**

**Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 9:00 am	Course Introduction and Welcome to the Park Hand in AWP Analysis	Russ Whitlock Becca Renaud
9:00 am – 10:00 am	Workshop	
10:15 am – 12:00 pm	Student Presentations (2 groups of 8) Event Center Education Center	Students
12:00 pm – 1:00 pm	Lunch	
1:00 pm – 1:45 pm	Student Presentations Move to Event Center	Students
2:00 pm – 4:30 pm	Leadership	Wolter
4:30pm – 5:00 pm	Quick Reflection & Instructor Evaluation Homework Assignment	Course Coordinators
Evening	(Help Desk is available)	

**Tuesday, October 20, 2015**

**Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements	Course Coordinators
8:30 am – 10:00 am	Intro to Work Types and the County Fair	Dems
10:00 am – 10:15 am	Break	
10:15 am – 12:00 pm	Data-Driven Decision Making (Part 1)	Tezel



12:00 pm – 1:30 pm	Lunch and Group Work	Students
1:30 pm – 2:30 pm	Data-Driven Decision Making (Part 2)	Pusey
2:30 pm – 5:00 pm	Strengths Based Leadership and Working in a Team	Wolter
5:00 pm – 5:15 pm	Quick Reflection & Instructor Evaluation Homework	Course Coordinators
Evening	(Help Desk is available)	

**Wednesday, October 21, 2015**  
**Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements	Course Coordinators
8:30 am – 10:00 am	Informal Visitor Contacts: Supporting Your Employees	Richard Ullman
10:00 am – 10:15 am	Break	
10:15 am – 11:30 am	Asset Management Planning	Mather/Jarvis
11:30 am – 1:00 pm	Lunch	
1:00 pm – 2:00 pm	Capital Investment Strategy	Tezel
2:15 pm – 3:30 pm	Project Planning	McCormick
3:30 pm – 3:45 pm	Break	
3:45 pm – 4:45 pm	Budgeting at the High Level	Spomer/Pusey
4:45 pm – 5:00 pm	Quick Reflection, Instructor Evaluation, and Homework	Course Coordinators
Evening	(Help Desk is available)	



**Thursday, October 22, 2015**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements	Course Coordinators
8:30 am – 9:30 am	Analysis & Consensus Exercise	Students
9:45 am – 11:45 am	Facility Project Development and Fund Sources	Spomer
11:45 am – 1:00 pm	Lunch	
1:00 pm – 4:00 pm	Budgeting	Pusey/Spomer
4:00 pm – 5:00 pm	Work Session	
5:00 pm – 5:30 pm	Quick Reflection & Instructor Evaluation Homework	Course Coordinators
Evening	(Help Desk is available)	

**Friday, October 23, 2015****Event Center, Johnson City**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements	Course Coordinators
8:30 am – 10:30 am	Mid-Term Exam	Course Coordinators
10:30 am – 11:00 am	Travel to Park	
11:00 am – 12:00 pm	Volunteer work at park	
12:00 pm – 1:00 pm	Lunch	
1:00 pm – 3:30 pm	Field Experience	Renaud
3:30 pm – 4:30 pm	Well-Being	Pusey/Tezel
4:30 pm – 5:00 pm	Quick Reflection & Instructor Evaluation Homework	Course Coordinators



**Saturday, October 24, 2015**

Time	Session Title	Guest Speakers
4:00 pm – 4:30 pm	Mandatory Student Team Check-in Hampton Inn (Help Desk is available)	SEOT Chiefs

**Sunday, October 25, 2015**

Time	Session Title	Guest Speakers
9:00 am – 9:30 am	Mandatory Student Team Check-in Hampton Inn (Help Desk is available)	SEOT Chiefs
4:00 pm – 5:00 pm	Mentor Briefing Hampton Inn	Course Coordinators
5:00 pm – 7:00 pm	Mentor-Student Barbecue Hampton Inn	All



**Week 2****Monday, October 26, 2015****Courthouse Annex, Johnson City (students)****Event Center, Johnson City (mentors)**

Time	Session Title	Guest Speakers
7:45 am – 8:30 am	Squad Meeting - Opening of Week 2 & Announcements	Students and Mentors
8:30 am – 12:30 pm	Writing Workshop	Dr. Dana Anderson
12:30 pm – 1:30 pm	Lunch	
1:30 pm – 2:30 pm	DLS#2 Planning	McCormick
2:30 pm – 3:30 pm	How to Facilitate an API How to participate in a Facilitation	Dems/McCormick Tezel/Pusey
3:30 pm – 5:30 pm	Work Session (Help Desk is available) Mentor Workshop I – Strengths Based Leadership with Wolter	Tezel Wolter/Pusey
Evening	(Help Desk is available) FLAM Filming	Students Mentors

**Tuesday, October 27, 2015****Courthouse Annex (students)****Event Center (mentors)**

Time	Session Title	Guest Speakers
8:00 am – 8:30 am	Good of the Day & Announcements Courthouse Annex	Course Coordinators
8:30 am – 9:30 am	API Facilitation 2 groups at Courthouse Annex 1 group at Event Center	Students and Mentors
9:45 am – 11:45 am	Re-Optimization Workshop Courthouse Annex Mentor Workshop II Event Center	Tezel Wolter/Pusey
12:30 pm – 1:30 pm	Lunch	
1:30 pm – 5:00 pm	Work Session (Help Desk is available)	Students



Mentor Field Experience		Renaud/Henderson
Evening	(Help Desk is available) FLAM Filming	Students Mentors

**Wednesday, October 28, 2015****Courthouse Annex**

Time	Session Title	Guest Speakers
8:00 am – 8:15 am	Good of the Day & Announcements	Course Coordinators
8:15 am – 9:15 am	Work Session	
9:30 am – 10:30 am	PFMD Update	Wilbur
10:30 am – 2:00 pm	Lunch and Student-Mentor Meetings	Students and Mentors
2:00 pm – 3:00 pm	Presentation Planning Presentation Planning for Mentors Dress Rehearsal	Steve Wolter Course Coordinators
3:00 pm – 3:30 pm	Quick Reflection & Instructor and Course Evaluation	Course Coordinators
3:30pm – 5:00 pm	Work Session	
Evening	Dress Rehearsal for Presentation (Help Desk is available)	Students/Mentors

**Thursday, October 29, 2015****Courthouse Annex**

Time	Session Title	Guest Speakers
8:00 am – 9:00 am	Individual and Group Photos Event Center	Class
9:00 am – 11:30 am	Presentations	Students
11:30 am – 1:00 pm	Lunch	
1:00 pm – 3:30 pm	Presentations	Students
3:30 pm – 4:30 pm	Class Conclusion	Course Coordinators





6:00 pm – 8:30 pm	Group Dinner and Close of Class Russo's
-------------------	--

**Friday, October 30, 2015**

Time	Session Title	Facilitator
7:30 am – 8:30 am	Breakfast with Mentors (Optional)	
8:30 am	Depart	

# INSTRUCTIONAL METHODS

---

This course incorporates a number of instructional methods that 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 as effective as possible. 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 retain 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.

## Successful Debriefing Techniques

The final key to a successful case study, simulation, or small group work assignment is the debrief. It allows the students 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.



# THE SIMULATION

---

## 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
- A design that addresses the FM Competencies
- 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 (Debrief)

## Goals of the Simulation

1. The students should be able to justify choices based on data elements.
2. The students should show awareness of the needs of park management, lack of data elements, and the need to address them with a tactful, persuasive argument.
3. The students should be able to research information and query knowledgeable sources.
4. The students should demonstrate good oral and written communication skills during the simulation.
5. The students should be able to speak the language of other divisions rather than rely on their own FM jargon.
6. Each student should be a productive member of a team.
7. The students should be able to sort through large amounts of information and decide what is important.
8. The team should be able to work through missing information and make decisions, document the decision, and move on.
9. Time Management

## Outcomes and Competency Development

### Technical and functional expertise training

- How to use the Annual Work Plan tool
- PMIS Project Development
- Total Cost of Facility Ownership (TCFO) Tool
- Current Replacement Value (CRV) calculation



### Problem-solving and decision-making skills

- As a maintenance person, they want to “fix” things (i.e., “Don’t make changes to the tool—Tell us what this tool tells you about the existing operation.”)

### Interpersonal and communication skills

- How are they communicating and reacting to the others in their SEOT world?
- How are they using persuasive speech to make an argument?

### Team-based competencies

- Are they building coalitions? (Child competency-FM Competencies)
- Are they using strengths and minimizing weaknesses?

Students’ final product will be a completed Annual Work Plan, which they will present to the SEOT Park Management in a 35-minute presentation that includes PowerPoint. In addition, they will also submit:

- Annual Work Plan – electronic copy

NOTE: Although an annual work plan tool has been developed, it is *vital* that instructors do not inadvertently mislead or confuse students who are looking for help creating annual work plans. We must present one voice on the subject. Unless you are *absolutely certain*, please do not answer questions about specifics regarding SEOT information or operations. Instead, refer students to the Help Desk.

In addition to the above products, students will also take a summative mid-term exam to measure their understanding of course content as well as information learned in Distributed Learning Session #1.

## **Role of Instructors/Facilitators**

### Instructor/Student Interaction

During the simulation, 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.

### 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., Interpretation, Budgeting, Cultural/Natural Resources, etc.) are still being taught. These lessons are framed in-sim as on-the-job or orientation training sessions for the SEOT Facility Manager. 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.



## 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 things for themselves, even if that means students make mistakes along the way.





# WEEK ONE

---

## Lesson Plans

# DAY 1: COURSE INTRODUCTION AND WELCOME TO THE PARK

---

**INSTRUCTORS/SPEAKERS:**

Course Coordinators  
Rebecca Renaud  
Russ Whitlock

**SESSION LENGTH:**

1 hour

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

- Describe the overall goals and objectives of the course.

**TRAINING AIDS:**

- "One word says it" (on flip chart)
- Sticky Pads for "One word..."

**HANDOUTS:**

- AFMP Introduction and Objectives (Student Manual - Preface)
- Course Agenda (Student Manual - Preface)
- Course and Instructor Evaluation (Booklet)
- Syllabus for AFMP (Student Manual - Preface)

**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.




	METHOD	CONTENT	TIME
	Discussion	<p><i>Mark Tezel</i></p> <p><b>Welcome to Course Three of the FMLP</b></p> <ul style="list-style-type: none"> <li>• Ask them to turn in their AWP Analysis papers</li> <li>• Reconvene the group of students.</li> <li>• Reiterate that they are becoming a group of leaders for the NPS's future.</li> <li>• Each step along the way takes them closer to leadership positions – are now embarking on the third of five courses in the FMLP.</li> <li>• Point them to the “Welcome to The Hill Country” in their student workbook</li> </ul>	5 min
	Activity	<p><b>Activity</b></p> <ul style="list-style-type: none"> <li>• Give them each a sticky pad and ask them to write one word that describes their experience so far. Ask them to take one minute to tell the class why that particular word sums it up.</li> <li>• Before ending the session, ask the students to post their sticky note on a flip chart sheet and talk (briefly—one minute or less!)</li> <li>• Ensure that photos are taken during this session</li> </ul>	30 min



	METHOD	CONTENT	TIME
	Presentation	<p><i>Sandy Pusey</i></p> <p><b>Overview of Course Goals and Leadership Perspective</b></p> <ul style="list-style-type: none"> <li>• Application of concepts learned during Principles and DLS#1.</li> <li>• Looking at management from a leadership perspective – must have leadership AND management skills, but must also have a vision for the future.</li> <li>• Leading a park is more than just facility management – other disciplines, staffing, etc.</li> <li>• What is expected from and hoped for the students from the perspective of the NPS's leaders.</li> </ul>	5 min
		<p><b>Course Objectives</b></p> <p><b>Introduction to the Course Objectives</b></p> <ul style="list-style-type: none"> <li>• Plan operations, maintenance, repair, and alterations function</li> <li>• Revise plans through evaluation to fit within budgeted funds.</li> <li>• Identify and utilize human, paper, and electronic resources to guide decision-making and planning process.</li> <li>• Analyze and evaluate data from multiple sources to inform planning and management decisions.</li> </ul>	5 min
	Presentation	<p><i>Rebecca Renaud, Russ Whitlock</i></p> <p>Welcome to Lyndon B. Johnson National Historical Park!</p>	10min



	METHOD	CONTENT	TIME
	Presentation	<p><i>Jenny Dems</i></p> <p><b>Review course agenda.</b></p> <ul style="list-style-type: none"><li>• Discuss facilities, lunch plans, evening plans (homework, events, and evening sessions).<ul style="list-style-type: none"><li>◦ <b>Lunch is at different times every day, so adjust your plans accordingly and read your agenda.</b></li></ul></li><li>• Introduce Assignments and Mid-Term Exam.</li><li>• Introduce Parking Lot Concept.</li></ul> <p><b>Reiterate the importance of feedback.</b></p> <ul style="list-style-type: none"><li>• Will be evaluating every day.</li><li>• Point them to the course evaluation in their workbooks. Instructor evaluations will be handed out at the end of each day.</li></ul>	5 min



# WELCOME TO SEOT

---

**INSTRUCTORS/SPEAKERS:** Steve Wolter

**SESSION LENGTH:** 1 hour

**OBJECTIVES:** *This session will:*

- Identify the purpose and need for annual work plans for this exercise.
- Identify the issues that the student groups will need to take into account when developing their SEOT Annual Work Plan (e.g., 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.
- Recognize the use of the various homework assignments in the creation of the final Annual Work Plan.
- Identify where students can go for help.

**TRAINING AIDS:**

- PPT and Flipchart with SEOT Team Members

**HANDOUTS:**

- SEOT Acceptance Letter (handout)
- Annual Plan Slider Sketch (handout)
- Presentation Guidelines (handout)
- SEOT Resource Packs (handout)
- FLREA Comp Plan and Collections (handout)
  - Labor and Financial Reports (jump drive)
- SEOT Fee Study (jump drive)
- SEOT Housing Management Plan (jump drive)
- SEOT PAMP (jump drive)
- SEOT GMP (jump drive)

For Cast:

- Interpretation Plan (Chief of Interpretation)
- EMS Plan (Chief of Resources)
- Project List (AO)
- Comment Cards (Chief of Interpretation)

**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.

- Form students into their teams by table at the beginning of the session





- Review the General Management Plan (GMP), unigrid, and website for information for SEOT.
- List the players and their corresponding roles in the simulation.
- Explain the purpose and significance of an annual work plan (AWP)
- Understand how to find SEOT data and begin describing the problem or exercise on which they will be working.
- Instructor team will not hand out any reports to the students; the students will have access to the data.
- Students have access to FMSS as “Read Only” for right now. Any errors need to be addressed via the Help Desk (Mark Tezel).

**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.
- Their annual work plans must be based on data. All planning decisions should have clear justifications and explanations.
- Even if you've seen or worked with an electronic annual work plan, start planning “on paper.”
- Cast:
  - Superintendent – Steve Wolter
  - Chief, Resource Mgmt – Mark Tezel
  - Chief, Administration – Sandy Pusey
  - Chief, Interpretation – Christy McCormick
  - Public Information Officer, Special Events Coordinator – Nona Henderson (on leave week one)
  - Chief, Visitor & Resource Protection – Jenny Dems
- During this session, collect the students' jump drives and load all materials.



	METHOD	CONTENT	TIME
	Presentation	<p><i>SEOT Superintendent</i> <i>Steve Wolter</i></p> <p><b>Introduction to SEOT</b></p> <ul style="list-style-type: none"> <li>• Introduce Staff <ul style="list-style-type: none"> <li>◦ Welcome to SEOT in your new role as Facility Manager</li> </ul> </li> <li>• Brief overview of SEOT and show movie</li> <li>• Your task</li> <li>• Provide Annual Plan Slider handout.</li> </ul> <p><b>Assignment Requirements</b></p> <ul style="list-style-type: none"> <li>• In the Annual Work Plan Analysis, they need to analyze what was good and bad from last year's AWP and will be meeting with one of the chiefs later this week to share with them what they discovered.</li> <li>• Explain the issues / tasks they must accomplish in their small groups, as well as schedule, how much time they will have to work on their group presentations</li> </ul> <p><b>Presentation Requirements</b></p> <ul style="list-style-type: none"> <li>• Time length and expectations (see Presentation Guidelines handout)</li> </ul>	20 min
	Discussion	<p><b>Discussion</b></p> <p>Clarify assignment and answer student questions</p>	30 min





# SUPERINTENDENT WELCOME SPEECH

---

## Introduction

Good Morning. I'm Steve Wolter, the Superintendent of Sea Otter Island, and on behalf of all of our staff, I would like to welcome the new Facility Manager to Sea Otter Island. I expect that you've already read up a little on the island, but I thought I'd do a quick overview to refresh your memory.

But before getting to that, I want to introduce your fellow chiefs. Mark Tezel, Chief of Resources; Christy McCormick, Chief of Interpretation, and Special Events Coordinator while Nona Henderson is on leave; Sandy Pusey, Chief of Administration; Carre Shandor, Budget Analyst; Jenny Dems, Chief of Visitor & Resource Protection; and you, of course, are the Chief of Maintenance. If you have any questions while you're here, please go to one of these chiefs—they're good people. For more on-the-ground matters, you should check with Mark.

Now for the park... I know you have already done your homework on this, but I wanted to provide you with a few details.

## Park Description

- SEOT is an island off the coast of Sphagnum, OR.
- Area is approximately 168 square miles of beaches, cliffs, forests, and meadows.
- Park established in 1933 to help preserve culture of American Indians and preserve history of European settlement as well as natural beauty

## Training

SEOT has one of the most intensive training and development programs in any park

- The next two weeks will be very intense
- I've scheduled some experts to come in and get you into shape
- Subjects range from project management, to budgeting and Annual Work Planning, to Fund Sources, and even Well-Being.

Remember, all of this training has been designed especially with you in mind, so don't ask if this is going to be on the test. It is. All of it. This job is one big test, so your task is make sense of what we're giving you to make you the best facility manager in the region, maybe the world.

So here's my part to help you realize your potential. I'm going to be around for a couple weeks off and on, so if you have any questions, feel free to ask.

You need to update the current annual work plan for your division.

## Your Assignment – An Annual Work Plan

You will present an Annual Work Plan on Thursday of next week. So, besides training, and getting oriented with the park, that's what you should spend your time on.



But more important than the tool is the actual plan, your view of the future, and how this concept fits into my vision [pass out *Annual Work Plan Slider*]. This is a little concept map and sketch that I made for my 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 elements: 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 these strategic plans impact 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 the Region 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 I throw a pebble in the water, there will be ripples. I want to know what those ripples are going to be. Your annual work plan should be able to supply that information from the Maintenance 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, which means giving people a better park and a better park experience. 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 meanwhile the grounds around the lighthouse are so overgrown that people can't access it.

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 Maintenance Division 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 this plan should be able to do: fuse other planning documents together into a useable form; communicate with park admin; improve efficiency; and increase accountability.

## Presentations

[pass out Presentation Guidelines handout]

Now, on next Thursday when you present your Annual Work Plan to me and the division chiefs, I want something a little more specific. Because I'm very detailed about presentations, we've created this guideline sheet to help new hires.



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, I also want a copy of your work plan, which has to be electronic since we are trying to reduce our paper consumption. That is due on Wednesday morning as soon as you get in.

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.

You'll be presenting this to me and the division chiefs next Thursday. Now, I know that's not much time, but I wouldn't have hired you if I didn't think you could pull it off.

Good luck, Chief. We're all expecting big things out of you.

**Oh, one more thing. The region sent me this report. [Pass out KPI report.] I don't know exactly what to do with this. Please make sure you address it in your presentation next week.**



## Staff Biographies

### Jenny Dems

Jenny Dems is the Chief of Visitor & Resource Protection at Sea Otter Island National Park. As Chief, Jenny manages a multi-faceted operation that includes supervision of field law enforcement rangers, boat patrol and management, traffic management, fire and EMS operations in conjunction with the town of Sphagnum, and search and rescue operations.

Jenny's National Park Service career began as a seasonal fee collection ranger at Lassen Volcanic National Park in 1980, continuing on to Crater Lake National Park where she began her law enforcement career. Other parks she has worked at include Yosemite National Park, Grand Canyon National Park, Glen Canyon National Recreation Area, Shenandoah National Park, and Grand Teton National Park. She also worked for the Ranger Activities branch in the Western Regional Office, San Francisco, where she assisted with law enforcement operations at Stinson Beach, Golden Gate National Recreation Area.

While employed with the National Park Service she has expanded her supervisory, management, and leadership skills. In 2007 she completed the year-long USDA Graduate School Executive Leadership Program. In 2010 she received the Excellence in Leadership Award for the Intermountain Region. She was an active member of the search and rescue team as a primary responder for high angle, swift water and helicopter/rappelling rescues. She was an advanced technical rock climber, a park medic, and served as an instructor for Basic Technical Rescue and Incident Command System. She has responded to numerous incidents and has received the U.S. Department of the Interior (DOI) Valor Award twice for demonstrating unusual courage in the face of danger.

Jenny enjoys hiking, camping, and exploring the not-so-traveled road. She has two grown boys and tries to spend as much time with them as possible.

### Nona Henderson

Nona Henderson is the Public Information Officer and Special Events Coordinator at Sea Otter Island National Park. In this role Nona is responsible for interfacing with the public, media, other national parks, federal agencies, and stakeholders to provide information regarding park events and incidents. She develops and distributes community information releases through local and national media, including TV, radio, newspaper, and social media. In addition, she is also the lead for the Special Park Use Program. She facilitates the permit process for special park events and oversees cost recovery efforts.

Nona began working as an interpreter with the National Park Service before transitioning into public information and special park uses. She first worked as a PIO during wildfires in 2008 at Whiskeytown National Recreation Area. She has since completed several courses in public information and relations through the Federal Emergency Management Agency (FEMA) and the National Interagency Fire Center (NIFC). She serves with a Type 2 Incident Command Team on major fires, VIP visits, lengthy search and rescues, law enforcement incidents, and multi-day special events throughout the NPS.

Nona enjoys bluegrass music, hiking with her husband and dog, and kayaking.



### Christy McCormick

Christy McCormick is the Chief of Interpretation at Sea Otter Island National Park. She has been at the park for nine years and Chief for five.

Christy did not spend her entire career with the National Park Service. She worked for a consulting firm for a number of years as a project manager. She decided to pursue an advanced degree in Adult Education, with a minor in Natural Resource Management. While working on her Master's Degree, she worked seasonally at Allegheny Portage Railroad National Historic Site. She joined the NPS in 2000 as a full-time employee and moved to George Washington Birthplace. After just one short year, she was recruited by Learning and Development to work with Katie Bliss, Training Manager on the Career Field Academy in Interpretation and Education at the Stephen T Mather Training Center. Christy worked on this project until 2004. She was offered and accepted a position at Sea Otter Island National Park and became Chief in 2010.

Christy is passionate about the history of Sea Otter Island and has developed a number of Interpretive Programs about the Lukanin family as well as the natural resources this island has to offer. As a fierce proponent of visitor education, she is heavily involved in the management of special use permits, and with her project management background she assists Chief Dems in the planning and execution of special events.

Christy has authored a number of articles on Interpretation and Education, which have been published in peer-reviewed and popular journals. Among them:

McCormick, C. (2009). Adding an interpretation theme to facility management projects in parks. *Parks & Recreation*, 9 (1), 45-50.

McCormick, C., & Dems, J. (2012). Interdisciplinary planning for special events. *Parks & Recreation*, 3(1), 16-21.

McCormick, C. (2013). People or plovers: Debating visitor use and enjoyment. *The George Wright Forum*, 26(1), 23-27.

McCormick, C. (2015). Sea Otter Island is not for sale: Protecting visitor use and enjoyment against special uses. *Legacy*, July/August(1), 9-15.

Christy is happiest when she is out on the water. She and her husband, a wooden boat builder and craftsman, sail or kayak in their custom-built crafts.

### Sandy Pusey-Cameron

Sandy Pusey-Cameron is the Chief of Administration at Sea Otter Island National Park (SEOT). As Chief, Sandy manages the park budget. She advises the Superintendent and other staff on regulation and policy related to the collection and expenditure of funds and monitors status towards meeting park goals and deadlines. She supports the Superintendent and management team by providing guidance on time and attendance, travel, vacancy announcements, recruitment, OWCP, employee benefits, retirement, diversity, and EEO. Sandy is responsible for establishing and maintaining internal administrative and fiscal control and prepares for and responds to administrative audits. She provides guidance to staff on acquisition procedures. Sandy promptly reports safety concerns or hazards to the park Safety Officer or Superintendent, warns other staff of



hazards, and maintains the administrative office space in a safe condition. She is a member of the park safety team.

Sandy's joined the National Park Service in 1999 as the Cultural Resources Program Manager at Fort Sumter National Monument (FOSU) and the Charles Pinckney National Historic Site (CHPI), both located in Charleston, South Carolina. In 2013 she became the Chief of Administration at FOSU and CHPI. In 2015 she was selected to become the Chief of Administration at SEOT. She has also served in temporary assignments and on various workgroups throughout her NPS career.

While employed with the National Park Service she has expanded her supervisory, management, and leadership skills. In 2008 she completed a year-long Leadership Program and was awarded the "Excellence in Leadership Award" and graduated with academic honors. She was an active member of the Southeast Region Emergency Response Team and maintained her red card certification until 2013.

In her free time, Sandy enjoys traveling, long walks on the beach, boating, shrimping, and spending time with family, friends, her husband Don, and their cat and two dogs. Sandy became a grandmother in 2014 and enjoys spoiling her granddaughter, Carter Grace.

### Carre Shandor

Carre Shandor is the Budget Analyst at Sea Otter Island National Park. As the budget analyst, Carre works under the Administrative Officer to manage the overall budget for SEOT in coordination with all the divisions at the park.

Carre's National Park Service career began as a term visitor use assistant at Death Valley National Park in 1998 after graduating from Texas A&M University. After two years, she then transferred into an administrative assistant position at Scotty's Castle within Death Valley National Park, supporting the three divisions (Interpretation, Resource Management, and Facilities) operating out of that site. In 2004, Carre transferred to the Facility Management division where she operated a \$3.5 million ONPS budget and a project budget that ranged from \$2-9 million depending on the year, as well as 10 reimbursable and income accounts (for quarters and 35B utilities).

From Death Valley, Carre was able to go on a detail to Fort Sumter National Monument and Chickasaw National Recreation Area before taking a position with SEOT. In 2012, Carre was chosen to serve on an extended detail to the Financial Business Management System Office during the FBMS deployment. She served as a trainer and gained experience with WBS processes and Energy Reporting.

Carre has a deep love for the parks, from the time she spent visiting them with her family as a small child, to now. She volunteers where she can, including as a First Responder and Ambulance Driver in Death Valley. Carre hopes to one day be an Administrative Officer at a park. For now, she continues to enjoy walking the trails with her two dogs, Karli and Nelly, and spending time with her husband, Aaron.



### Mark Tezel

Mark Tezel is a 30-year veteran of the National Park Service, now serving as the Chief of Natural and Cultural Resources Management at Sea Otter Island National Park.

Mark started his career as a seasonal interpreter at San Antonio Missions National Historical Park. He later worked as the park's first information technology specialist. Following his stint in the administrative division, Mark became a part of the Natural Resources team at San Antonio Missions with primary responsibilities in invasive plant management and Geographic Information Systems. Following a brief leave of absence to care for his two young children, Mark returned to San Antonio Missions, this time in the Facility Management division where he led the park's effort to implement and manage the Facility Management Software System. Mark added to his FMSS duties when he coordinated FMSS activities for all of the parks in Intermountain Region Hub 9.

Since arriving at Sea Otter Island, Mark has undertaken several major cultural and natural resources management projects, including integration of maintained cultural sites into the FMSS, a Wilderness Management Plan for the Sea Otter Island Wilderness, and invasive species management. Mark's work on the Plover Preservation Plan has been recognized Servicewide for its thoroughness and innovation.

Mark lives in Sphagnum with his wife, Alicia, and the youngest of their four children, Noah. Their other three children, Jacob, Kaitlin, and Samuel, are all living in their native Texas. They all love getting together to go hiking, boating, and skiing.

### Steve Wolter

Having served over 30 years in the parks and public lands field, Steve Wolter is now the Superintendent of Sea Otter Island National Park. His 9-year tenure at the Park has provided him with an opportunity to engage with various partners, indigenous groups, and state and national leaders in the preservation and enjoyment of this robust National Park.

Steve started his career as a seasonal maintenance worker for the U.S. Forest Service performing remote camp maintenance in the Boundary Waters Canoe Area Wilderness (BWCA). In this seasonal position, he also served as an informal visitor interpreter and wilderness first aid provider. He also worked as a Recreation Technician in the Superior National Forest. Having discovered the National Park Service during the creation of Voyageurs National Park, Wolter jumped agencies to the National Park Service. After serving as a seasonal interpreter at Channel Islands National Park, he moved into a position as a backcountry ranger in Yosemite National Park, eventually becoming the Supervisory Law Enforcement Wilderness Manager after graduating from FLETC.

Wolter has worked in the Pacific West Region of the National Park Service to implement unit Business Planning, Emergency Operations Plans, and Operational Leadership for the Region. He has also served in details in the Washington office to help implement revisions to asset management, partnerships, and interpretation policies and programs for the National Park Service.





As the acting Superintendent at Indiana Dunes National Lakeshore, Wolter led major civic engagement and resource management initiatives, including a National Geographic-funded BioBlitz program. After leaving Indiana Dunes, Wolter served as Superintendent of Assateague Island National Seashore before being named Sea Otter Island National Park Superintendent 9 years ago.

Steve has dedicated his stewardship of Sea Otter Island National Park to balancing the highly complex natural, cultural, and built resource challenges of the Park, along with the expansion of interest in the Park from area tribes and other residents wishing to ensure Sea Otter Island National Park is preserved and enjoyed.

Steve is joined by his spouse of 33 years, Lynn Jamieson, and is often visited by his two adult children, Byron and Benjamin, who enjoy being in the outdoors as much as Superintendent Wolter does.





# STUDENT PRESENTATIONS

---

**INSTRUCTORS/SPEAKERS:**

Course Coordinators, Students  
Evaluators:

Event Center: Steve Wolter, Sandy Pusey,  
Rebecca Renaud

Courthouse Annex: Mark Tezel, Jenny Dems,  
Christy McCormick

**SESSION LENGTH:**

2 hours and 45 minutes

**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 PPTs
- Camera, cassettes, iPads, and tripods
- Two flipcharts with student order

**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.
- Do not split students into groups until we do presentation intro.
- Split into two groups, trying to keep them with their SEOT teams.

**POINTS TO REMEMBER:**

- During this session, emphasize that each student will have ten minutes to present what they accomplished during the DLS #1 period. Breaks as appropriate during the presentations.

	METHOD	CONTENT	TIME
	Presentation	<p><i>Mark Tezel</i></p> <p><b>Introduction to Student Oral Presentations</b></p> <ul style="list-style-type: none"> <li>• Outline goals for oral presentations.</li> <li>• Share what project(s) were completed during the DLS #1 and lessons learned. Allow students to learn from one another's successes and mistakes.</li> <li>• Provide opportunity to practice oral presentation skills.</li> <li>• Describe how they applied concepts of asset management to a real-life setting.</li> <li>• Outline how their skill sets have changed during DLS#1, including development of leadership skills.</li> </ul>	5 min
	Presentation	<p><i>FMLP Students</i></p> <p><b>Student Oral Presentations</b></p> <ul style="list-style-type: none"> <li>• Key: Outline how skill set has changed, including development of leadership skills.</li> <li>• Share the project(s) they completed during DLS #1 and lessons learned. What competencies did they build?</li> <li>• Share both successes and mistakes.</li> <li>• Describe application of asset management concepts to your park.</li> </ul>	100 min



# LEADING FACILITY MANAGEMENT: CONTINUING THE JOURNEY TO MASTERING LEADERSHIP

**INSTRUCTORS/SPEAKERS:**

Steve Wolter

**SESSION LENGTH:**

2 hours and 15 minutes

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

- Review and recognize the leadership content provided during Principles of Asset Management and Distributed Learning Session 1 (DLS #1).
- Utilize different principles, concepts, and theories of leadership to synthesize a personal leadership framework.
- Define organizational development as a function of leading facility management through individual, group, and team leadership applications.
- Deliberately apply personal and group/team leadership frameworks to a leaderless group exercise as evidenced in the SEOT simulation.
- Begin the study of systems that affect leadership for facility managers in parks with a focus on diversity application, and power/influence in leadership.

**TRAINING AIDS:**

- PPT

**HANDOUTS:**

- The Leadership Experience PPT (Student Workbook)

**FACILITATOR NOTES:**

- This is a review of the past 5 months and a preview of the next 5 months of leadership topics. Be sure to emphasize the deliberate approach or use of the information using a 3 x 3 grid.

**POINTS TO REMEMBER:**




- Manager-Employee contract; leader's role and tasks.
- Review personal leadership frameworks; contingency theory, ethics, morals, traits, differences between leadership and management.
- Review group/team framework concepts of communication, motivation, interdependence, team effectiveness vs. team cohesiveness, group/team leadership roles.
- Discuss systems approach to leadership (shared world view).
- Emphasize use of this information in SEOT simulation
  - e.g., 2 roles of team leadership, motivation theory, communication approaches to dialogue, shared world view, etc.
- This session should be used to plan for the SEOT API leaderless group exercise as well as the simulation (another leaderless group activity).

	METHOD	CONTENT	TIME
		Steve Wolter to provide his own content	3 hrs




# QUICK REFLECTION AND INSTRUCTOR EVALUATION (DAY 1)

- 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.
- Students will need their laptops for the Scientific Method Session.
- Explain the BBQ lead team sign-up sheet and request that they sign up
  - They will be given \$200 for food and cutlery and will need to supply receipts

	METHOD	CONTENT	TIME
	Activity	<b>Quick Reflection</b> The students already have their Parking Lot pad— Give them time to jot down other thoughts. Collect papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.	5 min
	Discussion	<b>Group Discussion</b> <ul style="list-style-type: none"> <li>• Ask for responses.</li> <li>• Clarify the unclear; write key answers on flipchart to refer to throughout the course.</li> </ul>	5 min
	Presentation	<b>Review Course Objectives and What to Expect</b> <ul style="list-style-type: none"> <li>• Review course content from today (if needed) and remind students about the help desk (optional).</li> <li>• Review what objectives will be met tomorrow.</li> </ul>	5 min



	METHOD	CONTENT	TIME
	Homework	<p><b>Annual Work Plan Analysis</b></p> <p>In the October webinar, you were given the Annual Work Plan for Sea Otter Island National Park. Before updating your Annual Work Plan (AWP), you should analyze your current AWP. The analysis should be a combination of data and narrative. Some things you might want to consider in your review:</p> <ul style="list-style-type: none"> <li>• Actuals vs. planned work</li> <li>• Optimizer bands</li> <li>• APIs</li> <li>• Reduction of DM</li> <li>• Critical Systems Work</li> <li>• Alignment with the PAMP?</li> </ul> <p>The data elements that you discuss should be highlighted on the AWP Spreadsheet.</p> <p>You will turn in two documents to complete this assignment. First, you will turn in an edited AWP, which should include highlighted rows, cells, etc. that denote areas that you identify as a possible issue. Second, you will turn in an accompanying word document that describes the issues you discovered in the AWP. The narrative will include your justification for the issues found, while also providing recommendations to solve the issues. The narrative should be 500-800 words.</p> <p>This is what you turned in this morning.</p> <p>On Thursday, your SEOT team will be presenting a brief consensus-based analysis of last year's AWP, building off of your individual analyses. The rubric for the oral presentation will be provided to you.</p> <p><b>Strengths-based Leadership</b></p> <ul style="list-style-type: none"> <li>• Students should take the positive impact test—print it out and bring it along with all other documents regarding SBL, including book</li> <li>• <a href="https://strengths.gallup.com/">https://strengths.gallup.com/</a></li> <li>• BRING YOUR LAPTOPS TOMORROW FOR SCIENTIFIC METHOD!</li> </ul>	



# DAY 2: GOOD OF THE DAY, ANNOUNCEMENTS, SQUAD MEETING

**INSTRUCTORS/SPEAKERS:**

Course Coordinators

**SESSION LENGTH:**

30 minutes

**TRAINING AIDS:**






- Parking Lot (from Day 1)
- What is a simulation? Show video.

**HANDOUTS:**

- N/A

**FACILITATOR NOTES:**

- The purpose of the Good of the Day is to energize and instruct.
- Be attentive to the time.
- AWP Analysis Review

	METHOD	CONTENT	TIME
	Presentation	<ul style="list-style-type: none"> <li>• Review any issues from the Parking Lot</li> <li>• Briefly review the agenda of the day and any announcements</li> </ul>	5 min
	Presentation	<ul style="list-style-type: none"> <li>• What is a simulation?</li> <li>• What is "in-sim" and "out-of-sim"</li> <li>• Role Playing</li> </ul>	5 min
	Video	<i>Show SEOT Simulation video</i>	2 min
	Discussion	<ul style="list-style-type: none"> <li>• Ask students if they have questions about simulation.</li> <li>• Ask the students if they have/need clarification on any assignments this week</li> <li>• Hand back AWP Analysis and review (Mark Tezel).</li> </ul>	10 min
	Squad Meeting	<ul style="list-style-type: none"> <li>• Intro of the Management Team               <ul style="list-style-type: none"> <li>◦ "Steve introduced us briefly yesterday, here is a bit more about myself"</li> </ul> </li> </ul>	8 min



# INTRODUCTION TO WORK TYPES AND SUB-WORK TYPES

---

**INSTRUCTORS/SPEAKERS:**

Jenny Dems

**SESSION LENGTH:**

1 hour, 30 minutes

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

- Describe the Quality Assurance/Quality Control (QA/QC) process as it applies to the Annual Work Plan
- Correctly identify examples of work types and sub-work types.

**TRAINING AIDS:**

- Flipcharts with work type and sub-type headers
- Sticky notes with work activities already printed on them.

**HANDOUTS:**

- County Fair answer sheet (Handout)
- Work type and sub-type definition sheet (Student Manual)




**FACILITATOR NOTES:**

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.

**POINTS TO REMEMBER:**

- Keep the session lively —walk around!



	METHOD	CONTENT	TIME
 	Presentation Activity	<b>Work Types and Sub-Work Types County Fair</b> <ul style="list-style-type: none"> <li>• Definitions of all (use FM glossary for most)</li> <li>• Make sure to talk about FOSP and RPSO</li> <li>• Determining the correct work-type using a decision tree</li> <li>• Reiterate importance of correct classification of work types and implications of incorrect classifications.</li> <li>• Why are work types important? Why do we have problems classifying work types in the field?</li> <li>• Explain handout – Work and Sub-Work Type Definitions</li> <li>• 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.</li> </ul>	15 min
	Activity	<b>Student Exercise: Work Type County Fair</b> <ul style="list-style-type: none"> <li>• Ask them about their experiences with work type classification, any confusing areas, etc.</li> </ul>	75 min





**STUDENT EXERCISE: THE WORK TYPE COUNTY FAIR-ANSWER KEY**

1. Emptying trash cans in the comfort station = **FO-CU**
2. Re-glaze windows on historic structure = **FM-RM**
  - a. This is something that is done on a longer term basis, more than 1 year
3. Re-paving roads = **FM-CR**
  - a. The pavement is a component of the road. Chip sealing a road would be RM since it does not "replace" the pavement.
4. Snow and ice removal = **FO-SN**
5. Repair park signs damaged by vandalism = **FM-CM**
6. Remove tree dangling over house after a winter storm = **FM-EM**
  - a. Since this is a permanent fix to the problem, there is no need for an ICM work order.
7. Convert historic barn into offices for park interpretive staff = **CI-AL**
  - a. This is not enlarging the footprint of the building.
8. Patch potholes in main park road (has not been done for five years due to lack of funding) = **FM-RMDM**
9. Replace door with appropriate-size door to fit a wheelchair = **FM-LMAC**
  - a. This could be CI-LMAC if substantial work enlarging the doorway is included.
10. Mowing = **FO-GC**
11. Replant bulbs in a cultural landscape on an annual basis = **FM-PM**
  - a. PM is for up to a year, longer is RM
12. Build a loop with 12 sites in the campground = **CI-NC**
13. Replace a roof that is five years past its design life = **FM-CRDM**
14. Refinish wood floors in park residence = **FM-RM**
15. Litter pickup around the outside of the Visitor Center = **FO-GC**
16. Inspect fire hydrants = **FM-PM**
  - a. This is PM because it typically involves flushing the valves, a maintenance activity.
  - b. If you were inspecting fire extinguishers and not servicing them it would be FM-INFLSA
17. Replace park computers = **FM-CR**
  - a. Computers are components of the IT System.
18. Repair of deficiencies identified during an annual asset inspection = **FM-DM**
19. Prepare for seasonal trail closing = **FO-AD**
20. Immediate repairs to a blow out of a major water line = **FM-EM**
21. Build new visitor center at park headquarters = **CI-NC**
22. Winterize fountain = **FO-AD**
23. Service HVAC system = **FM-PM**
24. Make temporary repairs to road washed out in storm = **FM-ICM**
  - a. Permanent repairs will be on a follow up work order as FM-EM
25. Seasonal cleaning of gutters = **FM-PM**
  - a. Seasonal implies that it is done more than once a year, and that it is scheduled, therefore is PM.
26. Place temporary fencing around a burned out structure = **FO-ICM**
27. Replace park boundary fence (at the end of its estimated design life) = **FM-CR**
28. Move sink to appropriate height in ADA-designated housing unit = **FM-LMAC**



29. Add a new wing to the old visitor center = CI-NC
30. Semi-annual grading of unpaved roads = FM-PM
31. Repair stucco walls on historic church biannually = FM-RM
32. Initiate rodent control = FO-PC
33. Immediate repairs to broken residential water line = FM-EM
34. Feed and water stock animals = FM-PM
35. Professionally steam clean carpet (every two to five years) = FM-RM
  - a. Frequency determines that it is RM. Cleaning after a spill or other damage would be CM.
36. Replace carpet that is beyond its design life and has not received proper funding = FM-CRDM
37. Repair park signs (on an annual basis) = FM-PM
38. Attend a training session on supervision = FO-MG
39. Repair hole in roof due to hurricane = FM-EM
  - a. If no storm damage funds are received, then at the end of the current fiscal year, the storm-related EM work orders are moved to DM sub-work type.
  - b. If a blue tarp is first used, then that work would be on an FM-ICM work order.
40. Replace roof on park building at the end of its estimated design life = FM-CR
41. Prune shrubs and trees around visitor center = FM-RM
  - a. There is no frequency given, therefore additional information is needed to determine the appropriate work and sub-work type. If done frequently, it could be an FO-GC, like mowing. The purpose of the pruning can also help determine the appropriate work and sub-work types – i.e. after a storm it could be CM
42. Paint the exterior of a park building = FM-RM
43. Inspect and maintain generator = FM-PM
  - a. This is a maintenance activity and should be done on a scheduled basis, therefore it is a PM.
44. Replace siding on entrance station building = FM-CR
45. Repair cracks in plaster on walls and ceiling = FM-CM
46. Carcass removal = FO-SN
47. Monitor water quality for the water system = FO-PS
48. Supervision time of a PMIS project by a permanent employee = FO-MG
49. Enter FMSS actuals and also do the payroll = FO-MG
50. Empty dumpsters and drive to the landfill = FO-RC
51. Treat building for termites = FO-PC



# DATA-DRIVEN DECISION MAKING

---

**INSTRUCTORS/SPEAKERS:**

Mark Tezel  
Sandy Pusey  
2 hours, 45 minutes

**SESSION LENGTH:**

**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.
- Employ evidence-based analysis methods for making informed decisions.
- Use scientific reasoning terminology specific to analyzing, evaluating, and communicating data results.
- Identify the difference between significant data and less important, insignificant factors.

**TRAINING AIDS:**

- PPT
- Flip charts
- Prezi

**HANDOUTS:**

- Data-Driven Decision Making Practice 1 Strips (Handout)
- Terminology (Handout)
- Data-Driven Decision Making Steps (Student Workbook)
- Data-Driven Decision Making Practice 2 (Student Workbook)
- SEOT Fleet Research and Analysis Journal (Student Workbook)

**FACILITATOR NOTES:**

The flow of the session should be as follows:

- First talk about scientific method and data-driven decision making.
- Conduct activity.
- Make the link!
- The information presented in the Prezi portion of this session is concept-based. Frequently assess understanding of concepts and invite discussion about relevancy to their profession.
- Have another instructor write down students' ideas for the assignment.
- Four groups of four (make sure they are not in their SEOT groups).
- This session is split, with lunch in the middle. Before lunch, the scientific method and data-driven decision making will be presented. Students will work on a presentation during lunch, to be presented after lunch.





**POINTS TO REMEMBER:**

- **ENCOURAGE STUDENTS TO USE DATA TO SUPPORT RECOMMENDATIONS WHEN PRESENTING TO THE PARK SUPERINTENDENT.**





	METHOD	CONTENT	TIME
❖	Instructor Management	<i>This session requires students to use their laptops during lunch.</i>	
🔔 😊	Prezi Discussion	<p><b>Overview of Data-Driven Decision Making</b></p> <ul style="list-style-type: none"> <li>• State the problem.</li> <li>• Gather information on the problem.</li> <li>• Develop a hypothesis. <ul style="list-style-type: none"> <li>◦ Develop inferences using evidence. <ul style="list-style-type: none"> <li>▪ Example: SEOT experiences a high volume of visitors in the summer. In the previous two years, park workers were required to collect litter twice a week rather than the budgeted once per week. One may infer that the park does not have enough waste collection bins on or near the causeway.</li> <li>▪ What other inferences can be made from this problem?</li> </ul> </li> </ul> </li> <li>• Design and conduct research. <ul style="list-style-type: none"> <li>◦ Prezi moves from the overview to different types of research. <ul style="list-style-type: none"> <li>▪ Correlational research (conclusions drawn through observations) vs. experimental research (conclusions derived from manipulation of variables)</li> </ul> </li> </ul> </li> </ul> <p>Discuss the “So What?” factor of conducting research using the scientific method.</p> <ul style="list-style-type: none"> <li>• What steps must be considered in designing and conducting research? Measurement tools and techniques? Expertise? <ul style="list-style-type: none"> <li>◦ It all sums up to this: “If you cannot measure it, then you cannot manage it.”</li> </ul> </li> </ul>	15 min





	METHOD	CONTENT	TIME
	Presentation	Mark Tezel Show example scientific method and walk through steps (missing wallet).	10 min
	Activity	<b>Activity</b> Have students re-order scientific method example (SEOT Plover)  Allow time for discussion.	15 min
 	Prezi Discussion	<b>Analyze and Synthesize Data</b> <i>Information reliability and validity</i> <ul style="list-style-type: none"> <li>• <i>Using terminology, review the concept of observation reliability and validity.</i> <ul style="list-style-type: none"> <li>◦ <i>Use bullseye and targets for examples.</i></li> </ul> </li> <li>• <i>Use concrete examples of “reliable” Facility Management practices that produce “consistent and predictable results.”</i> <ul style="list-style-type: none"> <li>◦ <i>Positive example: condition assessments with standardized checklists. These levels ensure assessments are done in a consistent manner from one person to the next.</i></li> <li>◦ <i>Negative example: condition assessments without standardized checklists. Without preset conditions, results can vary greatly from person to person, thus impacting work and financial obligations. Additionally, differing checklists (from one contractor to the next) may measure different components, thus producing different results.</i></li> </ul> </li> </ul>	20 min





	METHOD	CONTENT	TIME
 	<b>Prezi</b> Discussion	<ul style="list-style-type: none"> <li>• <i>Validity in relation to asset management is encompassed in the PAMP's optimizer bands and designated Service levels.</i> <ul style="list-style-type: none"> <li>○ <i>Standard of Practice is the standard against which practices are measured, and ultimately sets service levels.</i></li> <li>○ <i>What you are measuring is the criterion for a topic (custodial, refuse, etc.) in the Optimizer Band.</i></li> <li>○ <i>Is the data that you are collecting representative of the measuring tool (industry standards, Whitestone Manuals)? This includes Work Type vs. Sub-Work Type. Basically, the information will not be specific enough to act upon.</i></li> </ul> </li> </ul>	






	METHOD	CONTENT	TIME
 	<b>Prezi</b> Discussion	<p><b>Identifying trends, patterns, and relationships</b></p> <ul style="list-style-type: none"> <li>• Trends or patterns may be evident when analyzing a wealth of data.               <ul style="list-style-type: none"> <li>◦ Discriminate between significant and insignificant data.</li> </ul> </li> <li>• Take into consideration the power of outliers as they may skew the patterns observed.               <ul style="list-style-type: none"> <li>◦ Outliers must be identified and analyzed (they are the red flags in your data).</li> <li>◦ Consider the context of the outlier's presence (is it due to abnormal usage of an asset, a one-time event, unavoidable weather damage?).                   <ul style="list-style-type: none"> <li>▪ Example: An on-demand water heater is efficient to its threshold. Your park's heater is experiencing an increase in usage above the threshold. Can a one-time event describe this fluke (e.g., park-wide celebration), or will the heater be working at an elevated level of use frequently?</li> <li>▪ Is the outlier due to random variability or is it part of a true trend?</li> </ul> </li> </ul> </li> </ul>	10 min






	METHOD	CONTENT	TIME
 	<b>Prezi</b> Discussion	<b>Multi-variable situations</b> <ul style="list-style-type: none"> <li>• <i>Rarely do relationships show a strong positive or negative association; relationships are often due to multiple variables.</i></li> <li>• <i>“Correlation does not imply causation.”</i> <ul style="list-style-type: none"> <li>○ Fallacy in implying a cause-effect relationship in two variables that seem related.</li> <li>○ Example: As ice cream sales increase, the rate of shark attacks increases. Therefore, ice cream consumption causes shark attacks.” Discuss the fallacy in assuming causation.</li> <li>○ The example does not take into account other variables influencing the increased rates of consumption (warmer weather) and shark attacks (feeding patterns due to warmer water).</li> <li>○ Ask students to provide examples of this principle in a facility management context.</li> </ul> </li> </ul>	10 min





	METHOD	CONTENT	TIME
 	<b>Prezi</b> Discussion	<b>Evaluate and Communicate Results</b> <ul style="list-style-type: none"> <li>• <i>Develop potential explanations for trends and relationships.</i> <ul style="list-style-type: none"> <li>◦ <i>Evaluate explanations using support from evidence.</i></li> <li>◦ <i>Reformulate problem statement, hypotheses, and analysis when needed.</i></li> </ul> </li> <li>• <i>Communicate your results.</i> <ul style="list-style-type: none"> <li>◦ <i>Summarize the research conducted, the key facts, and any valuable information uncovered.</i></li> <li>◦ <i>Include recommendations for improvement in processes, tools, etc.</i></li> <li>◦ <i>Keep in mind the audience. Gauge audience comprehension of subject matter and modify language as needed.</i></li> <li>◦ <i>In scientific reporting, it is important to present information in a certain way. Problem, Methodology, Data, Discussion.</i></li> </ul> </li> </ul>	10 min
	<b>Activity</b>	Sandy Pusey <ul style="list-style-type: none"> <li>• Divide students into their groups.</li> <li>• Each group gets the same problem statement related to SEOT (located in student manual).</li> <li>• As a group, prepare a Scientific Method approach for the problem statement.</li> </ul>	15 min



	METHOD	CONTENT	TIME
	Activity	<b>Activity</b> <ul style="list-style-type: none"> <li>Break into teams. Each group will work on the SEOT Fleet Research and Analysis study. Instruct the groups to follow the guidelines set by the Superintendent (see Supt email).</li> </ul>	60 min
	Activity	<i>Sandy Pusey</i> <ul style="list-style-type: none"> <li>Allow each group five minutes to present their findings and give a recommendation on which vehicles the park should purchase.</li> <li>Encourage students to ask questions about each group's decision process.</li> </ul>	20 min
	Debrief	<i>Sandy Pusey</i> <ul style="list-style-type: none"> <li>Highlight data-driven decision making (specifically analyze, evaluate, and communicate results) that you observed in the student presentations.</li> <li>Encourage students to consider the activity and content of this session when presenting their AWP.</li> <li>Ask students about the validity and reliability of the websites that they viewed. Are they credible?</li> <li>Did you consider support mechanisms when selecting a vehicle (gas station, charging station, fuel availability)? Will getting needed fuel and equipment increase costs?</li> </ul>	10 min



## Data-Driven Decision Making Practice 1 – Answer Key

### Steps

1 – State the Problem	5 – Analyze Data
2 – Gather Information	6 – Draw a Conclusion
3 – Develop a Hypothesis	7 – Report Results
4 – Experiment (Gather Data)	

### Directions

The following example is broken into the seven decision-making steps; however, the steps are out of order and need to be corrected. Read through the Action steps on the right and insert the correct Order/Step in the left column.

Order/Step	Action
5	Every night for two weeks the maintenance staff deploy the two live animal traps in an attempt to capture and relocate any captured predators. The staff captures five raccoons near the Boat-in camping access entrance and one raccoon at the other site over the 14-day period. It appears that there is more predator activity near the Boat-in camping access entrance than at the less-used part of the beach.
3	The Facility Manager surmises that the raccoons are being attracted to the beach area at night because of the trash left by the Boat-in camping access near the nesting sites.
1	The Facility Manager at SEOT has been receiving more and more complaints from visitor comment cards that state the Plover population seems to be declining over the last several years. In fact, many of the visitors state that the Plovers are an added bonus to their annual vacations to the island and it would be a shame to see them disappear. So the Facility Manager is trying to figure out what circumstances are causing the noticeable slow decline. Maybe it is a predator of sorts.
7	It seems as though the maintenance staff need to empty the Boat-in camping entrance trash receptacles before nightfall on a more regular basis instead of waiting until morning as per the usual rotation schedule. Now the Facility Manager wonders: is there more they can do to help shelter the Plovers during their nesting season?
2	After some research, it is learned that the Plover has predators that can be found on the island, such as raccoons.
4	It is decided to use two different live animal traps on the beach at night. One trap will be placed near the most frequently used trash receptacles near the Boat-in camping access entrance. The other trap will be placed further down the beach away from the Boat-in camping access entrance, but still close to the Plover nesting area. Each morning, the staff will check the traps and replace attractant/remove contents as necessary.
6	It seems the initial notion that raccoons are being attracted to the beach area at night because of left trash is supported by the findings.



# STRENGTHS BASED LEADERSHIP

---

**FACILITATOR NOTES:**

Engaging the students in this important topic is essential for them to understand how the simulation teams may better attain overall success, but more importantly how to synthesize much of the leadership knowledge and information they have been given to date. The ability of the group to apply their knowledge and skills in leadership to a practical scenario will be evidenced in the simulation as behaviors are observed and noted by the instructional team.




This session uses a combination of lecture, class discussion, small group discussion, and values clarification delivery methods to allow students to meet the session objectives. The facilitation must be flexible in order to allow students to feel comfortable exploring the concepts of strengths-based leadership and to apply those concepts to differing situations. Facilitation should also encourage students to feel comfortable sharing information with others in small groups and/or with the entire class.

Generally, the class should be taught using a fishbowl setup to allow groups to leave the circle for small group work and then return for larger group discussion and lecture. Flip charts should be provided for each work group as a home base to return to, and the handouts and topics should be presented in the progression as shown in the teaching outline.

**POINTS TO REMEMBER:**

- Every individual has leadership strengths and competencies
- The leadership competencies are not strengths and vice-versa
- Leadership capacity is unlimited and can be developed, which will strengthen overall leadership competency
- There are no leadership strengths that are better than others
- Discuss the leader's ability to "flex" strengths into areas needed by the team




	METHOD	CONTENT	TIME
	Activity	<b>Review Leadership Journey of Students</b> <i>Steve Wolter</i> <ul style="list-style-type: none"> <li>• Demonstrate the graphic representation process using butcher paper display: each student will chart their leadership journey to date using different color magic marker.</li> <li>• Have students complete the process en masse.</li> <li>• Review as a large group and ask for comments.</li> </ul>	40 min
	Discussion	<b>Introduce Strengths Based Leadership Concepts and Basis</b> <i>Steve Wolter</i> <ul style="list-style-type: none"> <li>• Introduce SBL content and, using prior assignments, review and discuss.</li> <li>• Objective is to tease out the important points of SBL to determine whether students have grasped and used this information.</li> </ul>	10 min
	Discussion	<b>Review Daft's "Leader as an Individual" Concepts, and Group-Team Leadership Concepts</b> <i>Steve Wolter</i> <ul style="list-style-type: none"> <li>• Review Daft concepts of leader as individual, impact of personality and preferences on leader's competency, FM leadership competencies, and the lecture from prior AFMP leadership sessions on group dynamics and function.</li> <li>• Remind students of these concepts using existing graphics from the Student Manual, or drawing upon prior webcasts and Principles course.</li> </ul>	5 min



	METHOD	CONTENT	TIME
☺	Facilitated Class Discussion, Case Study of Group Sharing, and Observation	<p><b>Discuss Strengths Based Leadership Tool and Application</b>  <i>Steve Wolter</i></p> <ul style="list-style-type: none"> <li>• Review SBL tools and summary of themes to students</li> <li>• Have students gather in SEOT assigned teams</li> <li>• The FMLP training team will show their SBL team grid and model excellent behavior in this situation by briefly sharing their SBL impacts and concepts               <ul style="list-style-type: none"> <li>○ Listen more than talk</li> <li>○ Do NOT interrupt</li> <li>○ Foster open, creative discussion</li> <li>○ Value all input</li> <li>○ Keep confidences</li> <li>○ Have fun</li> </ul> </li> <li>• At their tables, have each SEOT Simulation team chart their Top 5 chart (in poster form) using a distinct sticker color for each person (need colored dots)</li> <li>• Ask students to recreate exercise they just observed and share their individual themes from SBL and what it means to them</li> <li>• Have each SEOT Simulation team discuss their SBL themes with the whole group.</li> </ul>	45 min



	METHOD	CONTENT	TIME
	<b>Activity</b>  <b>Poster for each SEOT Team SBL Themes for discussion: what it means</b>	<b>Group-Team Distribution Chart and Action Strategy Planning</b> <i>Steve Wolter</i> <ul style="list-style-type: none"> <li>• Introduce students to team distribution chart and examine what it may mean to tasks/duties associated with SEOT and field work; discuss what action strategy planning is.</li> <li>• Allow SEOT teams to gather again and work on developing their team distribution chart further by synthesizing action strategies for a) potential situations, b) overall work group and team functions, c) changing conditions, etc. The group should identify possible action strategies to address anticipated situations and general work group functions.</li> <li>• Remind teams of 2 roles in teams/groups and ask them to focus on specific actions that they will implement to focus on task execution and socio-emotional needs of the team.</li> </ul>	30 min



	METHOD	CONTENT	TIME
☺	Discussion	<p><b>Application and Synthesis</b></p> <p><b>Use of Team Work in Simulation - Application</b></p> <p><i>Steve Wolter</i></p> <ul style="list-style-type: none"> <li>• Entire class reviews by sharing any results or insights they have had</li> <li>• Define work group vs. team from Daft; review 2 roles of leaders in groups-teams, and discuss facilitation tools.</li> <li>• Discuss how the SBL concept can work in their current workplace? In new virtual or place-based work groups?</li> <li>• Conclusion of SBL</li> <li>• Discuss positive impact of leaders, regardless of theme or style and positive impact test</li> <li>• Give out “drop in your bucket” post-it notes</li> <li>• Have students discuss positive impact test as homework for next day, good of the day</li> <li>• Remind students that the simulation is a leaderless group, or team (depending upon their choices) activity</li> </ul>	20 min







## Strengths-Based Leadership Guide

(with action strategies)

© 2000, 2006-2008 Gallup, Inc. All rights reserved.

Strengths

## Leader:

### The Four Domains of Leadership Strength

---

As Gallup studied and worked with thousands of leadership teams, we began to see that while each member had his or her own unique strengths, the most cohesive and successful teams possessed broader groupings of strengths. So we initiated our most thorough review of this research to date. From this dataset, four distinct domains of leadership strength emerged: Executing, Influencing, Relationship Building, and Strategic Thinking.

#### Executing

Leaders with dominant strength in the Executing domain know how to make things happen. When you need someone to implement a solution, these are the people who will work tirelessly to get it done. Leaders with a strength to execute have the ability to “catch” an idea and make it a reality.

#### Influencing

Those who lead by Influencing help their team reach a much broader audience. People with strength in this domain are always selling the team’s ideas inside and outside the organization. When you need someone to take charge, speak up, and make sure your group is heard, look to someone with the strength to influence.

#### Relationship Building

Those who lead through Relationship Building are the essential glue that holds a team together. Without these strengths on a team, in many cases, the group is simply a composite of individuals. In contrast, leaders with exceptional Relationship Building strength have the unique ability to create groups and organizations that are much greater than the sum of their parts.

#### Strategic Thinking

Leaders with great Strategic Thinking strengths are the ones who keep us all focused on what could be. They are constantly absorbing and analyzing information and helping the team make better decisions. People with strength in this domain continually stretch our thinking for the future.

## Strengths-Based Leadership Guide (with action strategies)

Gallup found that it serves a team well to have a representation of strengths in each of these four domains. Instead of one dominant leader who tries to do everything or individuals who all have similar strengths, contributions from all four domains lead to a strong and cohesive team. This doesn't mean that each person on a team must have strengths exclusively in a single category. In most cases, each team member will possess some strength in multiple domains.

According to our latest research, the 34 Clifton StrengthsFinder themes naturally cluster into these four domains of leadership strength. See below for how your top five themes sort into the four domains. Then, use the chart at the end of this report to plot your team members' top five themes and see how their strengths sort into the four domains as well. As you think about how you can contribute to a team and who you need to surround yourself with, this may be a good starting point.

## Your Top Five Clifton StrengthsFinder Themes

Executing	Influencing	Relationship Building	Strategic Thinking

## Followers' Four Basic Needs

Followers have a very clear picture of what they want and need from the most influential leaders in their lives: trust, compassion, stability, and hope. On the next several pages, for each of your top five Clifton StrengthsFinder themes, you will find a brief definition of the theme, strategies for leveraging that theme to meet followers' four basic needs, tips for leading others who are strong in that theme, and illustrations of what that theme sounds like in action.

Team Name: \_\_\_\_\_

Custom Team Distribution Chart

Team Members	Executing	Influencing	Relationship Building	Strategic Thinking

Use this guide to start to understand how you and your coworkers use your top themes to work together. You can use the Team Top 5 Grid as a reference to help answer these questions.

1. What are our top themes as a team, and what are the patterns of behavior that result?
2. How do we communicate?
3. What drives us?
4. How do we set direction and make decisions?
5. How do we overcome obstacles?
6. How do we build and maintain relationships?
7. How do we recognize each other and celebrate success?

## Positive Impact Test

1. I have helped someone in the last 24 hours.
2. I am an exceptionally courteous person.
3. I like being around positive people.
4. I have praised someone in the last 24 hours.
5. I have developed a knack for making other people feel good.
6. I am more productive when I am around positive people.
7. In the last 24 hours, I have told someone that I cared about her or him.
8. I make it a point to become acquainted with people wherever I go.
9. When I receive recognition, it makes me want to give recognition to someone else.
10. In the last week, I have listened to someone talk through his or her goals and ambitions.
11. I make unhappy people laugh.
12. I make it a point to call each of my associates by the name she or he likes to be called.
13. I notice what my colleagues do at a level of excellence.
14. I always smile at the people I meet.
15. I feel good about giving praise whenever I see good behavior.

## Achiever

---

Your Achiever theme helps explain your drive. Achiever describes a constant need for achievement. You feel as if every day starts at zero. By the end of the day you must achieve something tangible in order to feel good about yourself. And by “every day” you mean every single day — workdays, weekends, vacations. No matter how much you may feel you deserve a day of rest, if the day passes without some form of achievement, no matter how small, you will feel dissatisfied. You have an internal fire burning inside you. It pushes you to do more, to achieve more. After each accomplishment is reached, the fire dwindles for a moment, but very soon it rekindles itself, forcing you toward the next accomplishment. Your relentless need for achievement might not be logical. It might not even be focused. But it will always be with you. As an Achiever you must learn to live with this whisper of discontent. It does have its benefits. It brings you the energy you need to work long hours without burning out. It is the jolt you can always count on to get you started on new tasks, new challenges. It is the power supply that causes you to set the pace and define the levels of productivity for your work group. It is the theme that keeps you moving.

## Activator

---

“When can we start?” This is a recurring question in your life. You are impatient for action. You may concede that analysis has its uses or that debate and discussion can occasionally yield some valuable insights, but deep down you know that only action is real. Only action can make things happen. Only action leads to performance. Once a decision is made, you cannot not act. Others may worry that “there are still some things we don’t know,” but this doesn’t seem to slow you. If the decision has been made to go across town, you know that the fastest way to get there is to go stoplight to stoplight. You are not going to sit around waiting until all the lights have turned green. Besides, in your view, action and thinking are not opposites. In fact, guided by your Activator theme, you believe that action is the best device for learning. You make a decision, you take action, you look at the result, and you learn. This learning informs your next action and your next. How can you grow if you have nothing to react to? Well, you believe you can’t. You must put yourself out there. You must take the next step. It is the only way to keep your thinking fresh and informed. The bottom line is this: You know you will be judged not by what you say, not by what you think, but by what you get done. This does not frighten you. It pleases you.

### Adaptability

---

You live in the moment. You don't see the future as a fixed destination. Instead, you see it as a place that you create out of the choices that you make right now. And so you discover your future one choice at a time. This doesn't mean that you don't have plans. You probably do. But this theme of Adaptability does enable you to respond willingly to the demands of the moment even if they pull you away from your plans. Unlike some, you don't resent sudden requests or unforeseen detours. You expect them. They are inevitable. Indeed, on some level you actually look forward to them. You are, at heart, a very flexible person who can stay productive when the demands of work are pulling you in many different directions at once.

### Analytical

---

Your Analytical theme challenges other people: "Prove it. Show me why what you are claiming is true." In the face of this kind of questioning some will find that their brilliant theories wither and die. For you, this is precisely the point. You do not necessarily want to destroy other people's ideas, but you do insist that their theories be sound. You see yourself as objective and dispassionate. You like data because they are value free. They have no agenda. Armed with these data, you search for patterns and connections. You want to understand how certain patterns affect one another. How do they combine? What is their outcome? Does this outcome fit with the theory being offered or the situation being confronted? These are your questions. You peel the layers back until, gradually, the root cause or causes are revealed. Others see you as logical and rigorous. Over time they will come to you in order to expose someone's "wishful thinking" or "clumsy thinking" to your refining mind. It is hoped that your analysis is never delivered too harshly. Otherwise, others may avoid you when that "wishful thinking" is their own.



## Arranger

---

You are a conductor. When faced with a complex situation involving many factors, you enjoy managing all of the variables, aligning and realigning them until you are sure you have arranged them in the most productive configuration possible. In your mind there is nothing special about what you are doing. You are simply trying to figure out the best way to get things done. But others, lacking this theme, will be in awe of your ability. “How can you keep so many things in your head at once?” they will ask. “How can you stay so flexible, so willing to shelve well-laid plans in favor of some brand-new configuration that has just occurred to you?” But you cannot imagine behaving in any other way. You are a shining example of effective flexibility, whether you are changing travel schedules at the last minute because a better fare has popped up or mulling over just the right combination of people and resources to accomplish a new project. From the mundane to the complex, you are always looking for the perfect configuration. Of course, you are at your best in dynamic situations. Confronted with the unexpected, some complain that plans devised with such care cannot be changed, while others take refuge in the existing rules or procedures. You don’t do either. Instead, you jump into the confusion, devising new options, hunting for new paths of least resistance, and figuring out new partnerships — because, after all, there might just be a better way.

## Belief

---

If you possess a strong Belief theme, you have certain core values that are enduring. These values vary from one person to another, but ordinarily your Belief theme causes you to be family-oriented, altruistic, even spiritual, and to value responsibility and high ethics — both in yourself and others. These core values affect your behavior in many ways. They give your life meaning and satisfaction; in your view, success is more than money and prestige. They provide you with direction, guiding you through the temptations and distractions of life toward a consistent set of priorities. This consistency is the foundation for all your relationships. Your friends call you dependable. “I know where you stand,” they say. Your Belief makes you easy to trust. It also demands that you find work that meshes with your values. Your work must be meaningful; it must matter to you. And guided by your Belief theme it will matter only if it gives you a chance to live out your values.

### Command

---

Command leads you to take charge. Unlike some people, you feel no discomfort with imposing your views on others. On the contrary, once your opinion is formed, you need to share it with others. Once your goal is set, you feel restless until you have aligned others with you. You are not frightened by confrontation; rather, you know that confrontation is the first step toward resolution. Whereas others may avoid facing up to life's unpleasantness, you feel compelled to present the facts or the truth, no matter how unpleasant it may be. You need things to be clear between people and challenge them to be clear-eyed and honest. You push them to take risks. You may even intimidate them. And while some may resent this, labeling you opinionated, they often willingly hand you the reins. People are drawn toward those who take a stance and ask them to move in a certain direction. Therefore, people will be drawn to you. You have presence. You have Command.

### Communication

---

You like to explain, to describe, to host, to speak in public, and to write. This is your Communication theme at work. Ideas are a dry beginning. Events are static. You feel a need to bring them to life, to energize them, to make them exciting and vivid. And so you turn events into stories and practice telling them. You take the dry idea and enliven it with images and examples and metaphors. You believe that most people have a very short attention span. They are bombarded by information, but very little of it survives. You want your information — whether an idea, an event, a product's features and benefits, a discovery, or a lesson — to survive. You want to divert their attention toward you and then capture it, lock it in. This is what drives your hunt for the perfect phrase. This is what draws you toward dramatic words and powerful word combinations. This is why people like to listen to you. Your word pictures pique their interest, sharpen their world, and inspire them to act.

## Competition

---

Competition is rooted in comparison. When you look at the world, you are instinctively aware of other people's performance. Their performance is the ultimate yardstick. No matter how hard you tried, no matter how worthy your intentions, if you reached your goal but did not outperform your peers, the achievement feels hollow. Like all competitors, you need other people. You need to compare. If you can compare, you can compete, and if you can compete, you can win. And when you win, there is no feeling quite like it. You like measurement because it facilitates comparisons. You like other competitors because they invigorate you. You like contests because they must produce a winner. You particularly like contests where you know you have the inside track to be the winner. Although you are gracious to your fellow competitors and even stoic in defeat, you don't compete for the fun of competing. You compete to win. Over time you will come to avoid contests where winning seems unlikely.

## Connectedness

---

Things happen for a reason. You are sure of it. You are sure of it because in your soul you know that we are all connected. Yes, we are individuals, responsible for our own judgments and in possession of our own free will, but nonetheless we are part of something larger. Some may call it the collective unconscious. Others may label it spirit or life force. But whatever your word of choice, you gain confidence from knowing that we are not isolated from one another or from the earth and the life on it. This feeling of Connectedness implies certain responsibilities. If we are all part of a larger picture, then we must not harm others because we will be harming ourselves. We must not exploit because we will be exploiting ourselves. Your awareness of these responsibilities creates your value system. You are considerate, caring, and accepting. Certain of the unity of humankind, you are a bridge builder for people of different cultures. Sensitive to the invisible hand, you can give others comfort that there is a purpose beyond our humdrum lives. The exact articles of your faith will depend on your upbringing and your culture, but your faith is strong. It sustains you and your close friends in the face of life's mysteries.

## Consistency

---

Balance is important to you. You are keenly aware of the need to treat people the same, no matter what their station in life, so you do not want to see the scales tipped too far in any one person's favor. In your view this leads to selfishness and individualism. It leads to a world where some people gain an unfair advantage because of their connections or their background or their greasing of the wheels. This is truly offensive to you. You see yourself as a guardian against it. In direct contrast to this world of special favors, you believe that people function best in a consistent environment where the rules are clear and are applied to everyone equally. This is an environment where people know what is expected. It is predictable and evenhanded. It is fair. Here each person has an even chance to show his or her worth.

## Context

---

You look back. You look back because that is where the answers lie. You look back to understand the present. From your vantage point the present is unstable, a confusing clamor of competing voices. It is only by casting your mind back to an earlier time, a time when the plans were being drawn up, that the present regains its stability. The earlier time was a simpler time. It was a time of blueprints. As you look back, you begin to see these blueprints emerge. You realize what the initial intentions were. These blueprints or intentions have since become so embellished that they are almost unrecognizable, but now this Context theme reveals them again. This understanding brings you confidence. No longer disoriented, you make better decisions because you sense the underlying structure. You become a better partner because you understand how your colleagues came to be who they are. And counterintuitively you become wiser about the future because you saw its seeds being sown in the past. Faced with new people and new situations, it will take you a little time to orient yourself, but you must give yourself this time. You must discipline yourself to ask the questions and allow the blueprints to emerge because no matter what the situation, if you haven't seen the blueprints, you will have less confidence in your decisions.

### Deliberative

---

You are careful. You are vigilant. You are a private person. You know that the world is an unpredictable place. Everything may seem in order, but beneath the surface you sense the many risks. Rather than denying these risks, you draw each one out into the open. Then each risk can be identified, assessed, and ultimately reduced. Thus, you are a fairly serious person who approaches life with a certain reserve. For example, you like to plan ahead so as to anticipate what might go wrong. You select your friends cautiously and keep your own counsel when the conversation turns to personal matters. You are careful not to give too much praise and recognition, lest it be misconstrued. If some people don't like you because you are not as effusive as others, then so be it. For you, life is not a popularity contest. Life is something of a minefield. Others can run through it recklessly if they so choose, but you take a different approach. You identify the dangers, weigh their relative impact, and then place your feet deliberately. You walk with care.

### Developer

---

You see the potential in others. Very often, in fact, potential is all you see. In your view no individual is fully formed. On the contrary, each individual is a work in progress, alive with possibilities. And you are drawn toward people for this very reason. When you interact with others, your goal is to help them experience success. You look for ways to challenge them. You devise interesting experiences that can stretch them and help them grow. And all the while you are on the lookout for the signs of growth — a new behavior learned or modified, a slight improvement in a skill, a glimpse of excellence or of “flow” where previously there were only halting steps. For you these small increments — invisible to some — are clear signs of potential being realized. These signs of growth in others are your fuel. They bring you strength and satisfaction. Over time many will seek you out for help and encouragement because on some level they know that your helpfulness is both genuine and fulfilling to you.

## Discipline

---

Your world needs to be predictable. It needs to be ordered and planned. So you instinctively impose structure on your world. You set up routines. You focus on timelines and deadlines. You break long-term projects into a series of specific short-term plans, and you work through each plan diligently. You are not necessarily neat and clean, but you do need precision. Faced with the inherent messiness of life, you want to feel in control. The routines, the timelines, the structure, all of these help create this feeling of control. Lacking this theme of Discipline, others may sometimes resent your need for order, but there need not be conflict. You must understand that not everyone feels your urge for predictability; they have other ways of getting things done. Likewise, you can help them understand and even appreciate your need for structure. Your dislike of surprises, your impatience with errors, your routines, and your detail orientation don't need to be misinterpreted as controlling behaviors that box people in. Rather, these behaviors can be understood as your instinctive method for maintaining your progress and your productivity in the face of life's many distractions.

## Empathy

---

You can sense the emotions of those around you. You can feel what they are feeling as though their feelings are your own. Intuitively, you are able to see the world through their eyes and share their perspective. You do not necessarily agree with each person's perspective. You do not necessarily feel pity for each person's predicament — this would be sympathy, not Empathy. You do not necessarily condone the choices each person makes, but you do understand. This instinctive ability to understand is powerful. You hear the unvoiced questions. You anticipate the need. Where others grapple for words, you seem to find the right words and the right tone. You help people find the right phrases to express their feelings — to themselves as well as to others. You help them give voice to their emotional life. For all these reasons other people are drawn to you.

## Focus

---

“Where am I headed?” you ask yourself. You ask this question every day. Guided by this theme of Focus, you need a clear destination. Lacking one, your life and your work can quickly become frustrating. And so each year, each month, and even each week you set goals. These goals then serve as your compass, helping you determine priorities and make the necessary corrections to get back on course. Your Focus is powerful because it forces you to filter; you instinctively evaluate whether or not a particular action will help you move toward your goal. Those that don’t are ignored. In the end, then, your Focus forces you to be efficient. Naturally, the flip side of this is that it causes you to become impatient with delays, obstacles, and even tangents, no matter how intriguing they appear to be. This makes you an extremely valuable team member. When others start to wander down other avenues, you bring them back to the main road. Your Focus reminds everyone that if something is not helping you move toward your destination, then it is not important. And if it is not important, then it is not worth your time. You keep everyone on point.

## Futuristic

---

“Wouldn’t it be great if . . .” You are the kind of person who loves to peer over the horizon. The future fascinates you. As if it were projected on the wall, you see in detail what the future might hold, and this detailed picture keeps pulling you forward, into tomorrow. While the exact content of the picture will depend on your other strengths and interests — a better product, a better team, a better life, or a better world — it will always be inspirational to you. You are a dreamer who sees visions of what could be and who cherishes those visions. When the present proves too frustrating and the people around you too pragmatic, you conjure up your visions of the future and they energize you. They can energize others, too. In fact, very often people look to you to describe your visions of the future. They want a picture that can raise their sights and thereby their spirits. You can paint it for them. Practice. Choose your words carefully. Make the picture as vivid as possible. People will want to latch on to the hope you bring.

## Harmony

---

You look for areas of agreement. In your view there is little to be gained from conflict and friction, so you seek to hold them to a minimum. When you know that the people around you hold differing views, you try to find the common ground. You try to steer them away from confrontation and toward harmony. In fact, harmony is one of your guiding values. You can't quite believe how much time is wasted by people trying to impose their views on others. Wouldn't we all be more productive if we kept our opinions in check and instead looked for consensus and support? You believe we would, and you live by that belief. When others are sounding off about their goals, their claims, and their fervently held opinions, you hold your peace. When others strike out in a direction, you will willingly, in the service of harmony, modify your own objectives to merge with theirs (as long as their basic values do not clash with yours). When others start to argue about their pet theory or concept, you steer clear of the debate, preferring to talk about practical, down-to-earth matters on which you can all agree. In your view we are all in the same boat, and we need this boat to get where we are going. It is a good boat. There is no need to rock it just to show that you can.

## Ideation

---

You are fascinated by ideas. What is an idea? An idea is a concept, the best explanation of the most events. You are delighted when you discover beneath the complex surface an elegantly simple concept to explain why things are the way they are. An idea is a connection. Yours is the kind of mind that is always looking for connections, and so you are intrigued when seemingly disparate phenomena can be linked by an obscure connection. An idea is a new perspective on familiar challenges. You revel in taking the world we all know and turning it around so we can view it from a strange but strangely enlightening angle. You love all these ideas because they are profound, because they are novel, because they are clarifying, because they are contrary, because they are bizarre. For all these reasons you derive a jolt of energy whenever a new idea occurs to you. Others may label you creative or original or conceptual or even smart. Perhaps you are all of these. Who can be sure? What you are sure of is that ideas are thrilling. And on most days this is enough.



## Includer

---

“Stretch the circle wider.” This is the philosophy around which you orient your life. You want to include people and make them feel part of the group. In direct contrast to those who are drawn only to exclusive groups, you actively avoid those groups that exclude others. You want to expand the group so that as many people as possible can benefit from its support. You hate the sight of someone on the outside looking in. You want to draw them in so that they can feel the warmth of the group. You are an instinctively accepting person. Regardless of race or sex or nationality or personality or faith, you cast few judgments. Judgments can hurt a person’s feelings. Why do that if you don’t have to? Your accepting nature does not necessarily rest on a belief that each of us is different and that one should respect these differences. Rather, it rests on your conviction that fundamentally we are all the same. We are all equally important. Thus, no one should be ignored. Each of us should be included. It is the least we all deserve.

## Individualization

---

Your Individualization theme leads you to be intrigued by the unique qualities of each person. You are impatient with generalizations or “types” because you don’t want to obscure what is special and distinct about each person. Instead, you focus on the differences between individuals. You instinctively observe each person’s style, each person’s motivation, how each thinks, and how each builds relationships. You hear the one-of-a-kind stories in each person’s life. This theme explains why you pick your friends just the right birthday gift, why you know that one person prefers praise in public and another detests it, and why you tailor your teaching style to accommodate one person’s need to be shown and another’s desire to “figure it out as I go.” Because you are such a keen observer of other people’s strengths, you can draw out the best in each person. This Individualization theme also helps you build productive teams. While some search around for the perfect team “structure” or “process,” you know instinctively that the secret to great teams is casting by individual strengths so that everyone can do a lot of what they do well.

## Input

---

You are inquisitive. You collect things. You might collect information — words, facts, books, and quotations — or you might collect tangible objects such as butterflies, baseball cards, porcelain dolls, or sepia photographs. Whatever you collect, you collect it because it interests you. And yours is the kind of mind that finds so many things interesting. The world is exciting precisely because of its infinite variety and complexity. If you read a great deal, it is not necessarily to refine your theories but, rather, to add more information to your archives. If you like to travel, it is because each new location offers novel artifacts and facts. These can be acquired and then stored away. Why are they worth storing? At the time of storing it is often hard to say exactly when or why you might need them, but who knows when they might become useful? With all those possible uses in mind, you really don't feel comfortable throwing anything away. So you keep acquiring and compiling and filing stuff away. It's interesting. It keeps your mind fresh. And perhaps one day some of it will prove valuable.

## Intellection

---

You like to think. You like mental activity. You like exercising the “muscles” of your brain, stretching them in multiple directions. This need for mental activity may be focused; for example, you may be trying to solve a problem or develop an idea or understand another person's feelings. The exact focus will depend on your other strengths. On the other hand, this mental activity may very well lack focus. The theme of Intellection does not dictate what you are thinking about; it simply describes that you like to think. You are the kind of person who enjoys your time alone because it is your time for musing and reflection. You are introspective. In a sense you are your own best companion, as you pose yourself questions and try out answers on yourself to see how they sound. This introspection may lead you to a slight sense of discontent as you compare what you are actually doing with all the thoughts and ideas that your mind conceives. Or this introspection may tend toward more pragmatic matters such as the events of the day or a conversation that you plan to have later. Wherever it leads you, this mental hum is one of the constants of your life.

## Learner

---

You love to learn. The subject matter that interests you most will be determined by your other themes and experiences, but whatever the subject, you will always be drawn to the process of learning. The process, more than the content or the result, is especially exciting for you. You are energized by the steady and deliberate journey from ignorance to competence. The thrill of the first few facts, the early efforts to recite or practice what you have learned, the growing confidence of a skill mastered — this is the process that entices you. Your excitement leads you to engage in adult learning experiences — yoga or piano lessons or graduate classes. It enables you to thrive in dynamic work environments where you are asked to take on short project assignments and are expected to learn a lot about the new subject matter in a short period of time and then move on to the next one. This Learner theme does not necessarily mean that you seek to become the subject matter expert, or that you are striving for the respect that accompanies a professional or academic credential. The outcome of the learning is less significant than the “getting there.”

## Maximizer

---

Excellence, not average, is your measure. Taking something from below average to slightly above average takes a great deal of effort and in your opinion is not very rewarding. Transforming something strong into something superb takes just as much effort but is much more thrilling. Strengths, whether yours or someone else's, fascinate you. Like a diver after pearls, you search them out, watching for the telltale signs of a strength. A glimpse of untutored excellence, rapid learning, a skill mastered without recourse to steps — all these are clues that a strength may be in play. And having found a strength, you feel compelled to nurture it, refine it, and stretch it toward excellence. You polish the pearl until it shines. This natural sorting of strengths means that others see you as discriminating. You choose to spend time with people who appreciate your particular strengths. Likewise, you are attracted to others who seem to have found and cultivated their own strengths. You tend to avoid those who want to fix you and make you well rounded. You don't want to spend your life bemoaning what you lack. Rather, you want to capitalize on the gifts with which you are blessed. It's more fun. It's more productive. And, counterintuitively, it is more demanding.

## Positivity

---

You are generous with praise, quick to smile, and always on the lookout for the positive in the situation. Some call you lighthearted. Others just wish that their glass were as full as yours seems to be. But either way, people want to be around you. Their world looks better around you because your enthusiasm is contagious. Lacking your energy and optimism, some find their world drab with repetition or, worse, heavy with pressure. You seem to find a way to lighten their spirit. You inject drama into every project. You celebrate every achievement. You find ways to make everything more exciting and more vital. Some cynics may reject your energy, but you are rarely dragged down. Your Positivity won't allow it. Somehow you can't quite escape your conviction that it is good to be alive, that work can be fun, and that no matter what the setbacks, one must never lose one's sense of humor.

## Relator

---

Relator describes your attitude toward your relationships. In simple terms, the Relator theme pulls you toward people you already know. You do not necessarily shy away from meeting new people — in fact, you may have other themes that cause you to enjoy the thrill of turning strangers into friends — but you do derive a great deal of pleasure and strength from being around your close friends. You are comfortable with intimacy. Once the initial connection has been made, you deliberately encourage a deepening of the relationship. You want to understand their feelings, their goals, their fears, and their dreams; and you want them to understand yours. You know that this kind of closeness implies a certain amount of risk — you might be taken advantage of — but you are willing to accept that risk. For you a relationship has value only if it is genuine. And the only way to know that is to entrust yourself to the other person. The more you share with each other, the more you risk together. The more you risk together, the more each of you proves your caring is genuine. These are your steps toward real friendship, and you take them willingly.

## Responsibility

---

Your Responsibility theme forces you to take psychological ownership for anything you commit to, and whether large or small, you feel emotionally bound to follow it through to completion. Your good name depends on it. If for some reason you cannot deliver, you automatically start to look for ways to make it up to the other person. Apologies are not enough. Excuses and rationalizations are totally unacceptable. You will not quite be able to live with yourself until you have made restitution. This conscientiousness, this near obsession for doing things right, and your impeccable ethics, combine to create your reputation: utterly dependable. When assigning new responsibilities, people will look to you first because they know it will get done. When people come to you for help — and they soon will — you must be selective. Your willingness to volunteer may sometimes lead you to take on more than you should.

## Restorative

---

You love to solve problems. Whereas some are dismayed when they encounter yet another breakdown, you can be energized by it. You enjoy the challenge of analyzing the symptoms, identifying what is wrong, and finding the solution. You may prefer practical problems or conceptual ones or personal ones. You may seek out specific kinds of problems that you have met many times before and that you are confident you can fix. Or you may feel the greatest push when faced with complex and unfamiliar problems. Your exact preferences are determined by your other themes and experiences. But what is certain is that you enjoy bringing things back to life. It is a wonderful feeling to identify the undermining factor(s), eradicate them, and restore something to its true glory. Intuitively, you know that without your intervention, this thing — this machine, this technique, this person, this company — might have ceased to function. You fixed it, resuscitated it, rekindled its vitality. Phrasing it the way you might, you saved it.

## Self-Assurance

---

Self-Assurance is similar to self-confidence. In the deepest part of you, you have faith in your strengths. You know that you are able — able to take risks, able to meet new challenges, able to stake claims, and, most important, able to deliver. But Self-Assurance is more than just self-confidence. Blessed with the theme of Self-Assurance, you have confidence not only in your abilities but in your judgment. When you look at the world, you know that your perspective is unique and distinct. And because no one sees exactly what you see, you know that no one can make your decisions for you. No one can tell you what to think. They can guide. They can suggest. But you alone have the authority to form conclusions, make decisions, and act. This authority, this final accountability for the living of your life, does not intimidate you. On the contrary, it feels natural to you. No matter what the situation, you seem to know what the right decision is. This theme lends you an aura of certainty. Unlike many, you are not easily swayed by someone else's arguments, no matter how persuasive they may be. This Self-Assurance may be quiet or loud, depending on your other themes, but it is solid. It is strong. Like the keel of a ship, it withstands many different pressures and keeps you on your course.

## Significance

---

You want to be very significant in the eyes of other people. In the truest sense of the word you want to be recognized. You want to be heard. You want to stand out. You want to be known. In particular, you want to be known and appreciated for the unique strengths you bring. You feel a need to be admired as credible, professional, and successful. Likewise, you want to associate with others who are credible, professional, and successful. And if they aren't, you will push them to achieve until they are. Or you will move on. An independent spirit, you want your work to be a way of life rather than a job, and in that work you want to be given free rein, the leeway to do things your way. Your yearnings feel intense to you, and you honor those yearnings. And so your life is filled with goals, achievements, or qualifications that you crave. Whatever your focus — and each person is distinct — your Significance theme will keep pulling you upward, away from the mediocre toward the exceptional. It is the theme that keeps you reaching.

## Strategic

---

The Strategic theme enables you to sort through the clutter and find the best route. It is not a skill that can be taught. It is a distinct way of thinking, a special perspective on the world at large. This perspective allows you to see patterns where others simply see complexity. Mindful of these patterns, you play out alternative scenarios, always asking, “What if this happened? Okay, well what if this happened?” This recurring question helps you see around the next corner. There you can evaluate accurately the potential obstacles. Guided by where you see each path leading, you start to make selections. You discard the paths that lead nowhere. You discard the paths that lead straight into resistance. You discard the paths that lead into a fog of confusion. You cull and make selections until you arrive at the chosen path — your strategy. Armed with your strategy, you strike forward. This is your Strategic theme at work: “What if?” Select. Strike.

## Woo

---

Woo stands for winning others over. You enjoy the challenge of meeting new people and getting them to like you. Strangers are rarely intimidating to you. On the contrary, strangers can be energizing. You are drawn to them. You want to learn their names, ask them questions, and find some area of common interest so that you can strike up a conversation and build rapport. Some people shy away from starting up conversations because they worry about running out of things to say. You don’t. Not only are you rarely at a loss for words; you actually enjoy initiating with strangers because you derive satisfaction from breaking the ice and making a connection. Once that connection is made, you are quite happy to wrap it up and move on. There are new people to meet, new rooms to work, new crowds to mingle in. In your world there are no strangers, only friends you haven’t met yet — lots of them.

# QUICK REFLECTION AND INSTRUCTOR EVALUATION (DAY 2)

---

## INSTRUCTORS/SPEAKERS:

**SESSION LENGTH:** 15 min

**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:

- None

## HANDOUTS:

- Parking Lot Pads
- Instructor Evaluations (Booklet)
- FMLP Mentoring Assessment: Protégé Version

## 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.





	METHOD	CONTENT	TIME
	Activity	<b>Quick Reflection</b> The students already have their Parking Lot pad— Give them time to jot down other thoughts. Collect papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.	5 min
	Discussion	<b>Group Discussion</b> <ul style="list-style-type: none"> <li>• Ask for responses</li> <li>• Clarify the unclear; write key answers on flipchart to refer to throughout the course.</li> </ul>	5 min
	Homework	<b>Excel Homework (Solve the Mystery)</b> On your jump drives you have an Excel Workbook called "Excel Mystery Workbook." Using the directions in your workbook, you will have to solve a mystery. You will have to document your steps on the corresponding "Order of Operations" template provided, along with the name of the murderer. The workbook along with the Order of Operations assignment can be found on the AFMP portfolio site.  Your assignment is due tomorrow morning before the Good of the Day. Please upload your assignment to the AFMP portfolio site. We will not accept assignments on jump drives.  <b>Excel Q&amp;A (Optional)</b> 7:00 pm – 8:00 pm	



# DAY 3: GOOD OF THE DAY AND ANNOUNCEMENTS

---

**INSTRUCTORS/SPEAKERS:** Course Coordinators

**SESSION LENGTH:** 30 minutes

**TRAINING AIDS:**

- Parking Lot Pads from Previous Day
- Morning Meeting Toolkit
- A Part of Me Video

**HANDOUTS:**

- N/A



**POINTS TO REMEMBER:**

- Provide students with the opportunity to clarify any aspects of previous day that were unclear, as per one-minute paper.
- The Good of the Day should help the students learn a bit about each other.

**ANNOUNCEMENTS:**

- N/A



	METHOD	CONTENT	TIME
	Debrief	<p>Ensure that students have uploaded their homework onto the AFMP e-portfolio site</p> <p>Briefly review the agenda of the day and any announcements</p> <p><b>Parking Lot Review</b> Review parking lot questions and provide answers.</p>	10 min
	Discussion	<p><b>Morning Meeting Toolkit (in-sim)</b></p> <ul style="list-style-type: none"> <li>• Pull up the morning meeting toolkit and show Mark Tezel's video</li> <li>• Script (see below)</li> </ul>	
	Activity	<p><b>A Part of Me Video</b></p> <p>Show "A Part of Me Video" so students can get to know each other a little better.</p>	5 min

Script (Superintendent or Acting Superintendent):

*"At Sea Otter Island, we believe in investing in our employees. One of the ways you as the Facility Manager should be investing in your people is by meeting regularly with your staff. And I am not talking about just reviewing work assignments, but helping them to grow professionally, or just do their job better. Recently, a Morning Meeting Toolkit was developed to help you with that.*

*So, please go into the website and create a morning meeting topic. There is a pretty cool template in there that helps you to do that. Then, at a squad meeting later, we will ask you to preview the topic."*

**"ANY QUESTIONS ON THAT?"**



# INFORMAL VISITOR CONTACTS: SUPPORTING YOUR EMPLOYEES

---

**INSTRUCTORS/SPEAKERS:** Richard Ullman

**SESSION LENGTH:** 1 hour and 30 minutes

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

- Define an informal visitor contact.
- Explain the importance of conducting effective informal visitor contacts.
- Read basic visitor cues and respond appropriately.
- Provide support to staff for conducting informal visitor contacts.

**TRAINING AIDS:**

- Flip chart and markers
- PowerPoint
- Index cards

**HANDOUTS:**

- Visitor cues scenario cards (handout)

**FACILITATOR NOTES:**

- In-simulation
- Should be focused on training your subordinates in customer service to conduct effective informal visitor contacts.



**POINTS TO REMEMBER:**

- As a supervisor, you need to support your employees in becoming 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.






	METHOD	CONTENT	TIME
❖	Instructor Management	Prior to starting the session, load the Informal Visitor Contact videos (on EPLY training laptop).	
😊	Discussion	<p><b>Introduction</b></p> <p><i>SEOT Superintendent</i></p> <p>A quick quiz for you as we begin our next session!</p> <p>Q: Which division of the National Park Service has the most employees?</p> <p>A: Maintenance</p> <p>Q: Which division of the National Park Service has the most interactions with visitors on a day-to-day basis?</p> <p>A: Maintenance</p> <p>Q: Therefore, who ensures their employees are aware of this and helps each employee understand how to serve visitors well?</p> <p>A: We (Facility Managers) do!</p> <p>Good job on the quiz! Here to help you help your staff and our visitors in the realm of visitor contacts is Richard Ullman, Chief of Interpretation at Petrified Forest National Park.</p>	5 min






	METHOD	CONTENT	TIME
	Presentation	<p><b>Richard Ullman</b>  <b>Introduction to Informal Visitor Contacts</b></p> <ul style="list-style-type: none"> <li>• Visitors believe that any uniformed employee should be able to answer their questions and meet their needs.</li> <li>• While few facility maintenance employees will deliver a formal presentation to the visitors, all maintenance employees will provide orientation and information to visitors.</li> <li>• Interpretation can help the visitor care about the resource so that they may be motivated to help care for it.</li> <li>• Informal visitor contacts refer to highly personalized, casual contacts with the visitor, the kind that facility maintenance employees engage in.</li> <li>• Role of supervisor in informal visitor contacts is preparing staff to answer questions and interact with the public.</li> </ul>	5 min
	Discussion	<p><b>Student Exercise:</b> Have participants reflect on their own experiences as visitors:</p> <ul style="list-style-type: none"> <li>• Describe a situation where they needed to get directions while at a site on vacation. Who gave them directions? How were the directions provided?</li> <li>• Describe a situation where they needed specific information to make their visit more enjoyable. Who provided that information? How was it provided?</li> </ul>	5 min






	METHOD	CONTENT	TIME
	Presentation	<b>PowerPoint Presentation</b> <ul style="list-style-type: none"> <li>• What is an informal visitor contact?</li> <li>• Why are informal visitor contacts so important?</li> <li>• How do informal visitor contacts help fulfill the NPS mission?</li> <li>• What types of informal visitor contacts are there?</li> <li>• Steps of an informal visitor contact.</li> <li>• Providing quality customer service.</li> </ul>	10 min
	Discussion	<b>Quality Customer Service</b> Student Exercise: Brainstorm components of quality customer service. <ul style="list-style-type: none"> <li>• Professional image.</li> <li>• Professional behavior.</li> <li>• Interpersonal communication.</li> <li>• Include discussion of poor customer service to flesh out things not to do as well as things to do.</li> </ul>	10 min
	Activity	<b>Self-Evaluation</b> Have the class complete the Quality Customer Service Activity Sheet.  <b>Transition:</b> In order to provide quality customer service, you need to know how to assess visitor needs.	15 min




	METHOD	CONTENT	TIME
	Presentation	<b>PowerPoint Presentation – Assessing Visitor Needs</b> 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. <ul style="list-style-type: none"> <li>• How do visitors communicate their needs?</li> <li>• Verbal communication</li> <li>• Body language</li> </ul>	10 min
	Video	Show video clips from Informal Visitor Contacts e-course. <ul style="list-style-type: none"> <li>• What cues did the visitors show in each clip that gave you a clue about their needs?</li> </ul>	
	Activity	<b>Informal Visitor Contacts Scenarios</b> <ul style="list-style-type: none"> <li>• Have groups of three role-play informal visitor contact scenarios.</li> <li>• One serves as visitor, one serves as employee, and one serves as note taker.</li> <li>• Be sure the visitors provide non-verbal cues that help reveal their state of mind. Employees should act as if in a real informal visitor contact and do their best to read and react to visitor cues and provide for the visitor's needs.</li> <li>• Participants should use the <i>Reading and Projecting Cues</i> handout located in the Visitor Cues tutorial in their student manual.</li> </ul>	15 min





	METHOD	CONTENT	TIME
	Debrief	<p>Debrief</p> <ul style="list-style-type: none"> <li>• Ask note takers to share what happened in their groups/what they witnessed.</li> <li>• Ask “employees” which visitor cues they saw. Ask class whether they witnessed any other cues.</li> <li>• Have “visitors” explain which cues they were attempting to portray and ask them to read the scenario to the class.</li> </ul> <p><b>Transition:</b> Did any of you feel like you needed to know more about your site to completely meet the visitors’ needs? The third component of effective informal visitor contacts is knowing your site.</p>	5 min
	Presentation	<p>PowerPoint Presentation – Knowing Your Site</p> <ul style="list-style-type: none"> <li>• Orientation</li> <li>• Location of restrooms, trails, exhibits, places to eat and sleep, etc.</li> <li>• Resource information</li> <li>• Facts about plants, animals, your work, history, etc.</li> <li>• Interpretive content</li> <li>• Tangibles and intangible links, resource meanings, appropriate techniques</li> <li>• Your staff will not need to be prepared to provide interpretive content to visitors</li> </ul>	5 min
	Activity	<p><b>Know Your Site Activity Sheet</b></p> <p>Have students complete “Know Your Site” activity sheet in student workbooks.</p> <ul style="list-style-type: none"> <li>• Ask if any of them want to share their thoughts about it.</li> </ul>	15 min



	METHOD	CONTENT	TIME
	Presentation	<b>PowerPoint Presentation</b> <ul style="list-style-type: none"> <li>• Conclusion <ul style="list-style-type: none"> <li>○ As a supervisor, role is to train, support, and empower staff to conduct effective informal visitor contacts.</li> </ul> </li> </ul>	5 min



# ASSET MANAGEMENT PLANNING

---

**INSTRUCTORS/SPEAKERS:**

Mark Tezel

**SESSION LENGTH:**

1 hour and 30 minutes

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

- Show where planning fits as an important part of overall asset management.
- Provide a picture of total cost of facility ownership showing what we planned, what we did, the final outcome, and what we can do in the future.
- Demonstrate how to use planning tools as conduits to make well informed decisions.

**TRAINING AIDS:**

- Mather Video
- Jarvis Video
- O&M Estimates for San Juan Acequia Trail at SAAN

**HANDOUTS:**

- N/A





**FACILITATOR NOTES:** This session meets and serves multiple purposes. It:

- Provides a look at the push to build assets during the early days of the NPS.
- Shows how that build-up of large infrastructure led to the deferred maintenance backlog of today.


**POINTS TO REMEMBER:**

- N/A



	METHOD	CONTENT	TIME
	Presentation	<i>Stephen Mather's Web-chat</i>	5 min
	Discussion	<p><i>Mark Tezel</i></p> <ul style="list-style-type: none"> <li>• Mather saw that there was a need to “sell” the parks to the public and to Congress in order to get their financial support.</li> <li>• Best way to get people into the parks was to build infrastructure (assets)</li> <li>• Some of that infrastructure that was built was spectacular, but costly to maintain. <ul style="list-style-type: none"> <li>◦ Example: Going-to-the-Sun Road</li> </ul> </li> <li>• Mather's plans were predicated on the idea that funding would go up if the assets were built.</li> </ul>	25 min
	Presentation	<i>Jon Jarvis's Testimony</i>	5 min
	Discussion	<p><i>Mark Tezel</i></p> <ul style="list-style-type: none"> <li>• In his testimony before congress Jon Jarvis directly addressed the large deferred maintenance backlog, including a large portion of that backlog in roads projects.</li> <li>• Some of these projects are on the same roads that Stephen Mather pushed to build.</li> <li>• When we build assets, do we ask the tough questions? <ul style="list-style-type: none"> <li>◦ What will be the cost to operate and maintain these assets?</li> <li>◦ Is the funding for these assets sustainable?</li> <li>◦ Can we continue to operate these assets in times of lower funding?</li> </ul> </li> </ul>	25 min



	METHOD	CONTENT	TIME
	Activity	<p><i>Mark Tezel</i></p> <ul style="list-style-type: none"><li>• Review the example of the O&amp;M estimate for the San Juan Acequia Trail at SAAN<ul style="list-style-type: none"><li>○ RS Means and CESS can provide good estimates for O&amp;M</li></ul></li><li>• Include your estimates for new assets in your annual work plans.<ul style="list-style-type: none"><li>○ Walker Building is a relatively new asset at SEOT.</li><li>○ Estimate the costs for operating and maintaining the Walker Building.</li></ul></li></ul>	



Project Estimate

Project: Acequia Trail Operations and Maintenance  
Date: December 6, 2010  
Estimator: Mark Tezel

Direct Costs

Item	Means #	Description	Quantity	Units	Unit Cost	Item Cost	Cycle	Annual Cost	Unit Labor	Labor Hrs	Crew	Days	Annual Days
1	32 01 30.10 6130	Clean Sidewalks of Vehicle Marks	10.049	MSF	\$ 14.50	\$ 145.71	4	\$ 582.84	0.267	2.68	1	0.34	1.34
2	32 01 30.10 6400	Clean Paths	175.226	MSF	\$ 29.00	\$ 5,081.55	4	\$ 20,326.22	0.583	102.16	1	12.77	51.08
3	04 01 30.20 0220	Cleaning of Stone Walls	546	SF	\$ 1.29	\$ 704.34	1	\$ 704.34	0.2	109.20	2	6.83	6.83
4	32 01 90.19 5000	Mow Strip	1104	LF	\$ 0.08	\$ 88.32	24	\$ 2,119.68	0.001	1.10	1	0.14	3.31
5-8	26 56 33.10 8000	Replace Lights	7	EA	\$ 470.00	\$ 3,290.00	0.25	\$ 822.50	2	14.00	1	1.75	0.44
9	32 01 90.29 0100	Weed control	1716.88	SY	\$ 0.54	\$ 927.12	24	\$ 22,250.76	0.01	17.17	1	2.15	51.51
10	32 01 90.19 1660	Mow Buffalo Grass	14.032	MSF	\$ 39.50	\$ 554.26	24	\$ 13,302.34	0.364	5.11	2	0.32	7.66
11	32 01 90.19 1660	Mow Native Grass	54.505	MSF	\$ 39.50	\$ 2,152.95	4	\$ 8,611.79	0.364	19.84	2	1.24	4.96
13-16	GreenScapes	Irrigation Maintenance	2	Acre	\$ 291.00	\$ 582.00	12	\$ 6,984.00	0.364	0.73	1	0.73	8.74
16	32 01 90.23 0070	Tree Trimming	10	EA	\$ 165.00	\$ 1,650.00	1	\$ 1,650.00	1.053	10.53	4	2.63	2.63
17	32 01 90.19 4160	Mow Maintenance Buffer	524.961	MSF	\$ 2.53	\$ 1,328.15	12	\$ 15,937.82	0.027	14.17	2	7.09	85.04
18	Clab	Refuse Collection	3	EA	\$ 10.53	\$ 31.60	156	\$ 4,929.60	0.33	1.00	1	1.00	155.98
Total						\$ 16,536.00		\$ 98,221.88		297.69		36.97	379.52

Indirect Costs

Item	Means #	Description	Quantity	Units	Unit Cost	Item Cost
						\$ -
						\$ -
						\$ -
Total						\$ -
		Subtotal				\$ 98,221.88
		City Cost Index			91%	\$ (8,839.97)
		Subtotal				\$ 89,381.92
		Contingency & Bond			0%	\$ -
		Subtotal				\$ 89,381.92
		Overhead and Profit			10%	\$ 8,938.19
		Project Total				\$ 98,320.11

# CAPITAL INVESTMENT STRATEGY

---

**INSTRUCTORS/SPEAKERS:** Mark Tezel

**SESSION LENGTH:** 1 hour

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

- Explain Capital Investment Strategy
- Clarify and apply Capital Investment Strategy as it applies to Annual Work Planning for Sea Otter Island.

**TRAINING AIDS:**

- CIS Video
- Wapama Videos

**HANDOUTS:**

- 






**FACILITATOR NOTES:** This session is in-simulation and serves multiple purposes.

- At the end of the session there should be a discussion about the CCC-built RA Dorm B. This National Register-eligible building will be obsolete with the addition of the quarters in the Walker Building and is at the point of “no return”
- Compare the decisions that will need to be made on Dorm B to those made at the Wapama.

**POINTS TO REMEMBER:**



- 



	METHOD	CONTENT	TIME
	Video	<i>Capital Investment Strategy</i>	10 min
	Discussion	<p><i>Mark Tezel</i></p> <ul style="list-style-type: none"> <li>• The video introduces the concepts of the Capital Investment Strategy.</li> <li>• CIS aims to direct limited base funding to the highest priority assets based on the optimizer band.</li> <li>• In addition, project scores will be affected, again to direct limited project funds to the higher priority assets.</li> <li>• Discuss floor levels               <ul style="list-style-type: none"> <li>◦ Optimizer Band 1 – 55% of required PM</li> <li>◦ Optimizer Band 2 – 50% of required PM</li> <li>◦ Optimizer Band 3 – 25% of required PM</li> </ul> </li> </ul>	10 min
	Video	<i>Introduction to the Wapama</i>	5 min
	Discussion	<p><i>Mark Tezel</i></p> <ul style="list-style-type: none"> <li>• The Wapama was not only a cultural resource, but also a facility.</li> <li>• Emphasize that it was a temporary ship that survived.               <ul style="list-style-type: none"> <li>◦ How many times in the NPS have we built a “temporary” facility, only to see it become permanent?</li> <li>◦ Discuss the resources that would be necessary to keep these facilities open.</li> </ul> </li> </ul>	10 min
	Video	<i>The Disposition of the Wapama</i>	5 min





	METHOD	CONTENT	TIME
	Discussion	<p><i>Mark Tezel</i></p> <ul style="list-style-type: none"> <li>The park made the extremely difficult decision to dispose of the Wapama. <ul style="list-style-type: none"> <li>What were some of the factors in that decision?</li> <li>While this decision was made prior to the CIS, the process was similar to the goals of the CIS.</li> </ul> </li> <li>Discuss the curator's comments about the process that the staff went through to decide what parts of the Wapama to keep as part of the collection. <ul style="list-style-type: none"> <li>What we put in the collection we would need to maintain.</li> <li>The staff was very careful about putting pieces in the collection because of the cost of maintenance.</li> </ul> </li> </ul>	10 min
	Activity	<ul style="list-style-type: none"> <li>Have the students break into their teams and discuss the application of the CIS at SEOT, and how they will reflect that in their AWP.</li> <li>Bring up the CCC-built Dorm B, which will become obsolete with the opening of the Walker Building quarters.</li> <li>Debrief the discussion</li> </ul>	10 min



# PROJECT PLANNING

---

**INSTRUCTORS/SPEAKERS:** Christy McCormick

**SESSION LENGTH:** 1 hour and 15 minutes

**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)
- Blank Project Plan with Instructions (electronic)
- Flipchart
- PPT

**HANDOUTS:**

- Blank Project Plan with Instructions (student manual)

**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.
- 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:**

- A short-answer question on the mid-term asks why visitation trends and special events impact operations planning. Ensure that this is covered in this session!
- At the beginning of the session, tell the students they won't need their student workbooks and to hand in their jump drives.
- One member of the instructor team will load the Project Plan and Project Plan with Instructions onto the jump drive.
- When the instructor gets to "Dissecting the Project Plan," point to the Project Plan in the student workbook.




**INTRODUCTION:***Superintendent*

Here's my tip to make the most of your time: plan. Although planning does take time in the beginning, it will save you time in the end. That said, planning is an art, not a science, so to guide you on how to make project plans we have planning artist Christy McCormick. You may recognize her as Chief of Interp, but in her former life she was a Project Management Consultant in an organizational development company primarily working overseas. We were lucky to pull her in. 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 a minute.



	METHOD	CONTENT	TIME
😊	Discussion	<p><i>Christy McCormick</i></p> <p><b>Planning for the SEOT Annual Work Plan</b></p> <ul style="list-style-type: none"> <li>• Ask the students: <ul style="list-style-type: none"> <li>○ When you were given your assignment, what types of things did you discuss? Not looking for exact strategy, but more about how you are planning for the development and presentation of the Annual Work Plan?</li> <li>○ Record these on flipchart: Use this information in the “Dissecting the Project Plan” section.</li> </ul> </li> <li>• How many of you have written project plans and what form do they take?</li> <li>• As the collateral duty officer for Special Park Use Permits, I am going to take you through a Project Plan that I used for one of our Special Events.</li> <li>• This should help you in completing your homework, which is to develop a project plan for all your deliverables for next week.</li> <li>• Go to the Blank Project Plan in your Student Workbook.</li> </ul>	10 min





	METHOD	CONTENT	TIME
	Presentation	<p><b>Dissecting the Project Plan</b></p> <ul style="list-style-type: none"> <li>• <b>Project Summary</b> - If someone knew nothing about SEOT Annual Work Planning, what would you include here to clarify it (in 50-100 words)?</li> <li>• <b>Project Background</b> - It should include the relevant project background and the opportunity.</li> <li>• <b>Goal</b> - Short and relevant.</li> <li>• <b>Objectives</b> - Should speak to the goal.</li> <li>• <b>Scope</b> - Defining what is out of scope is almost as important as what is in scope—particularly when you are immersed in the project. When project team members disagree or when the project seems to be running off track, often if you have defined the out-of-scope elements, you can get back on track again.</li> <li>• No project proceeds with absolute certainty. Think of <b>assumptions and constraints</b> as educated guesses.</li> <li>• Assumptions bring possibilities; constraints means limits.</li> <li>• <b>Stakeholders</b> - You can go into detail here if you feel it is warranted. Why is it important to know who your stakeholders are and how they would be impacted?</li> <li>• <b>Deliverable(s)</b> - Exactly what are you going to provide? <ul style="list-style-type: none"> <li>○ What is the format (Excel/electronic, Word/electronic, or hard copy)?</li> <li>○ Describe deliverables in easily understandable terms.</li> <li>○ So, how is outcome different than deliverable?</li> </ul> </li> </ul>	25 min



METHOD	CONTENT	TIME
	<ul style="list-style-type: none"> <li>• <b>Roles and Responsibilities</b> - Who is needed to complete this project?</li> <li>• <b>Schedule summary is SO important</b> <ul style="list-style-type: none"> <li>○ Establish milestones to ensure you will finish on time.</li> <li>○ Track your progress.</li> <li>○ Take this seriously.</li> <li>○ Also note that in many projects you may need to adjust these as you go.</li> </ul> </li> <li>• <b>Dependencies, Risks, and Issues</b> <ul style="list-style-type: none"> <li>○ <b>Dependencies</b> - What is the difference between a dependency and a constraint? A dependency is something you need that you have not a whole lot of control over, but it is critical to project success.</li> <li>○ <b>Risks</b> - So what could happen that might affect your finishing the project successfully? And what is the probability that it might happen?</li> <li>○ <b>Issues</b> - Issues are things that are actually happening as opposed to risks that MIGHT happen.</li> </ul> </li> </ul>	



	METHOD	CONTENT	TIME
	Activity	<b>Class Activity</b> <ul style="list-style-type: none"> <li>• Divide class into three groups of five people (not SEOT groups). <ul style="list-style-type: none"> <li>○ Group One:</li> <li>○ Group Two:</li> <li>○ Group Three:</li> <li>○ Group Four:</li> <li>○ Group Five:</li> <li>○ Group Six:</li> </ul> </li> <li>• Give each group a few elements of a project plan.</li> <li>• Have them brainstorm possible entries into the project plan.</li> <li>• Present to the group at large. This should help them in doing their homework as the groups are each represented by each team.</li> </ul>	40 min
	Debrief	<b>Homework</b> <ul style="list-style-type: none"> <li>• Write Project Plan for Annual Work Plan (Each team will hand one in)</li> <li>• <b>DUE:</b> Thursday, October 22, at the beginning of the day</li> </ul>	



# BUDGETING AT THE HIGH LEVEL

---

**INSTRUCTORS/SPEAKERS:** Lissa Spomer

**SESSION LENGTH:** 1.0 hour

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

- Arrange the Steps of the Budget Cycle
- Describe the Roles of the Key Players in the Budget Processes
- Explain how the budget process involves three separate fiscal year budgets simultaneously

**TRAINING AIDS:**

- PPT
- Flip chart
- 20x30 poster of Budget Cycle

**HANDOUTS:**

- Large Budget cycle icons (handout)
- Blank Budget Cycle Diagram (handout)
- Budget cycle icons (stickers)
- Congressional Budget Process (handout)
- Key Players in the Budget Process (student manual)

**FACILITATOR NOTES:**

This session serves multiple purposes. It



- Introduces the budget cycle in simplified form – this in turn establishes the structure of the course.
- Helps students see how they fit into the overall budget process.
- Establishes foundational information to equalize students' experience with different aspects of the budget process.

**POINTS TO REMEMBER:**


- Make sure you don't put up the Budget Cycle poster until after you have talked about it in class.








	METHOD	CONTENT	TIME
	Activity	<p><i>Lissa Spomer</i></p> <p><b>Budget Cycle Overview</b></p> <p>Activity: Order the Budget Cycle</p> <p><i>Form students into groups of three. Each group is given a diagram of the Budget Cycle and icons. Students attach the icons in the order that they think the budget cycle goes in.</i></p>	10 min.
	Presentation	<p>The budget cycle begins and ends with parks, but goes through various levels of the budget process (Use Activity Flip Diagram).</p> <p>[Refer students to the diagram in the workbook]</p> <ol style="list-style-type: none"> <li>1. Parks respond to the SCC</li> <li>2. Regions review</li> <li>3. WASO reviews</li> <li>4. DOI reviews</li> <li>5. OMB reviews</li> <li>6. Congress reviews and has hearings</li> <li>7. Congress appropriates and President signs</li> <li>8. Distribution back down</li> </ol>	10 min.



	METHOD	CONTENT	TIME
	Presentation	<b>Key Players</b> <i>Describe what each does.</i> <ul style="list-style-type: none"> <li>• Park/Office               <ul style="list-style-type: none"> <li>○ Superintendents</li> <li>○ Division Chiefs</li> </ul> </li> <li>• Regional Office/Directorate               <ul style="list-style-type: none"> <li>○ Regional Director</li> <li>○ Associate Regional Directors</li> <li>○ Support Office Superintendent</li> <li>○ Budget Officer</li> </ul> </li> <li>• WASO               <ul style="list-style-type: none"> <li>○ Director</li> <li>○ Deputy Director</li> <li>○ Associate Directors/Programs</li> <li>○ Comptroller</li> <li>○ Budget Officer</li> </ul> </li> <li>• Department of the Interior               <ul style="list-style-type: none"> <li>○ Secretary of the Interior</li> <li>○ Assistant Secretary: Fish, Wildlife, and Parks</li> <li>○ Assistant Secretary: Policy, Budget, and Administration</li> <li>○ DOI Budget Officer</li> </ul> </li> <li>• OMB               <ul style="list-style-type: none"> <li>○ OMB Examiner</li> </ul> </li> <li>• Congress               <ul style="list-style-type: none"> <li>○ House                   <ul style="list-style-type: none"> <li>▪ Sub-Committee Chairman</li> <li>▪ Majority Staff Director</li> </ul> </li> <li>○ Senate                   <ul style="list-style-type: none"> <li>▪ Sub-Committee Chairman</li> <li>▪ Majority Clerk</li> </ul> </li> </ul> </li> </ul>	10 min.



	METHOD	CONTENT	TIME
	Presentation	<b>Chronology of the Budget Process – Concurrency</b> <ul style="list-style-type: none"> <li>A full budget cycle is three years [see Congressional Budget Process]</li> <li>Budget Process has three phases – <ul style="list-style-type: none"> <li>Formulation</li> <li>Justification</li> <li>Execution <ul style="list-style-type: none"> <li>Based on the Congressional Budget Process sheet, when is Formulation occurring? Justification? Execution?</li> <li>Answer: Formulation : Nov – Feb (of the next FY); Justification: March – Sept.; Execution: Oct – Sept.</li> <li>In October, what's happening with the FY16 Budget? FY17Budget? FY18 Budget?</li> <li>In February, what's happening with the FY16 Budget? FY17Budget? FY18 Budget?</li> </ul> </li> </ul> </li> </ul>	10 min.
	Presentation	<ul style="list-style-type: none"> <li>Make up of a budget request</li> <li>Mandatory vs. Discretionary</li> <li>Appropriations</li> </ul>	5 min.
	Presentation	<ul style="list-style-type: none"> <li>Bringing all back together <ul style="list-style-type: none"> <li>Greenbook vs. Final Budget</li> </ul> </li> </ul>	5 min.
		<ul style="list-style-type: none"> <li>Questions</li> </ul>	10 mins



# QUICK REFLECTION AND INSTRUCTOR EVALUATION (DAY 3)

---

**INSTRUCTORS/SPEAKERS:** Course Coordinators

**SESSION LENGTH:** 15 min

**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.

**TRAINING AIDS:**

- None

**HANDOUTS:**

- Parking Lot Pads
- Instructor Evaluations (Booklet)

**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.



	METHOD	CONTENT	TIME
	Activity	<b>Quick Reflection</b> The students already have their Parking Lot pad— Give them time to jot down other thoughts. Collect papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.	5 min
	Discussion	<b>Group Discussion</b> <ul style="list-style-type: none"> <li>• Ask for responses</li> <li>• Clarify the unclear; write key answers on flipchart to refer to throughout the course.</li> </ul>	5 min
	Homework	<b>Project Plan (Team)</b> Each team is required to complete one project plan. The project plan template is found on the student jump drive and on the e-portfolio site.	



# DAY 4: GOOD OF THE DAY, SQUAD MEETING, SPECIAL EVENT

---

**INSTRUCTORS/SPEAKERS:** Jenny Dems (Acting Superintendent)

**SESSION LENGTH:** 30 minutes

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

- Identify the role of the maintenance division in the Special Event
- Discuss the implications of the Special Event to the Annual Work Plan

**TRAINING AIDS:**

- None

**HANDOUTS:**

- Map of Lukanin Homestead area with Jenny's mark-ups of where things will go.

**FACILITATOR NOTES:**



- This session will serve as the "kink" in the Annual Work Plan.
- Do not answer any questions about the event unless you are sure of the answer.
- Since this is prior to the field experience, the students may use their time tomorrow to ask questions about their special event. But, don't give anything away!
- The script includes questions that the other Chiefs ask to "start the ball rolling."

**POINTS TO REMEMBER:**

During this session, emphasize that:

- There will be no cost recovery
- Each division will shoulder the load for the expenses they incur



	METHOD	CONTENT	TIME
	Presentation	<p><i>SEOT Superintendent (Acting)</i>  <i>Jenny Dems</i></p> <ul style="list-style-type: none"> <li>Using the speech, give the students their "twist" in the Annual Work Plan</li> <li>The Chiefs should all act surprised (like we are all hearing it for the first time)</li> </ul>	20 min
	Discussion	<p><b>Discussion</b></p> <ul style="list-style-type: none"> <li>Use this time to field questions from the students</li> </ul>	10 min



# SUPERINTENDENT SPEECH: SPECIAL EVENT

---

Good Morning. Well, our Friends group has finally gotten their act together! We have a big event coming our way next month!

But before getting to that, let me give you a bit of history. Heritage Apple Days, which is November 21<sup>st</sup> and 22<sup>nd</sup> of this year, started out as a small event to encourage the community to come and visit Sea Otter Island. Each year on a Saturday near Thanksgiving, the park would open the doors to anyone who wanted to come and pick apples to make their Thanksgiving pies. Every year, it has grown a bit to include music, vendors, and demonstrations, but I wouldn't call it a blockbuster, by any stretch of the imagination.

The Sea Otter Island Friends group has finally incorporated and they want to celebrate this by holding a fundraiser on November 21<sup>st</sup>, in conjunction with the Heritage Apple Days Festival. They have used their political ties and... hang on to your hats, the President and his family will be attending, as of right now! That means we will likely see the Governor attend as well as State Representatives.

What that means is that all leave is cancelled for that weekend. I know your folks might not be happy about that since it is the weekend before Thanksgiving. We expect, of course, for it to be all hands on deck. Each division will have to shoulder some of the economic burden, so all the personnel expenses of your division, including overtime, will hit your budget.

Your responsibilities will be (and please take notes on this):

- Preparing a space for the Secret Service and the Presidential team.
- Mowing and marking for parking
- Installing a temporary culvert across the dip in the field to get the cars in
- Setting up stage, tables, chairs
- Picking up any rentals that we have
- Running lights and electrical
- Trash pickup
- Maintaining Trailer port-a-johns
- Remediation of all the areas

Interp and Resources—I will let you know what your responsibilities will be, but just like the Facility Management Division, you will be in attendance and all personnel expenses, including overtime, will hit your budget.

I will be the Incident Commander and you may direct questions to me in Steve's absence. I know that he has tasked you with revising your division's Annual Work Plan, but you will need to do some adjustments based on this. I hope you agree that this is a real coup for our park and The National Park Service as a whole. It is our opportunity to show off our little





park in the best possible light. Steve has given this his full support and upon his return will be the liaison with the Friends group.

I also know that this is short notice... Let's just make the best of it, OK?

Questions?

Interp: "How much will this fundraiser cost?"

Jenny: \$250 per person

Interp: Look, Heritage Apple Days is a small festival where we waive our entrance fees to encourage visitation from our community. They won't be able to afford this.

Jenny: Yes, I am aware. Let's look at the big picture and what this means to our park.

Resources: This sounds like a lot of degradation to our resources. What are we doing about Compliance?

Jenny: We will complete all the necessary documentation and make sure all the proper steps are taken.

Resources: Hmmpf.

AO: From a budgetary standpoint, is the Friends group paying for any of this?

Jenny: They will be offering their services for set-up and parking assistance, and they will also be doing all of the publicity, media (working with Nona, our PIO), and event photography. As I said, we (the park) will absorb all other costs. Each division is responsible for their share.

AO: How many people do you think we should expect?

Jenny: Well, since this is our first rodeo, so to speak, we really don't know. But I think 500 is probably a good estimate to work with.



# AWP GROUP ANALYSIS & CONSENSUS

---

**INSTRUCTORS/SPEAKERS:** Instructors

**SESSION LENGTH:** 1 hour

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

- Demonstrate proper intergroup facilitation skills.
- Apply data-driven analysis skills for problem solving.

**TRAINING AIDS:**

- N/A

**HANDOUTS:**

- N/A

**FACILITATOR NOTES:**

- Make sure to be an impartial observer because the group is supposed to reach consensus and agree to their own analysis and present a cogent argument.
- Teams will be pre-sorted and there will be two sections of three student teams.
  - Two instructors will be assigned to each section. Each team will have 10 minutes to present their analysis with up to 8 minutes of Q&A following each presentation.
- This is not a video-recorded session.

**POINTS TO REMEMBER:**

- Each group has a limited amount of time. There is only an hour devoted to this session.

AWP Analysis Groups		
TEAM ONE TEAM TWO	TEAM THREE TEAM FOUR	TEAM FIVE
Tezel and Shandor	Pusey and McCormick	Dems and Spomer



# FACILITY PROJECT DEVELOPMENT AND FUND SOURCES

---

**INSTRUCTORS/SPEAKERS:**

Lissa Spomer

**SESSION LENGTH:**

1 hour and 30 minutes

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

- Describe the project life cycle from requesting, formulating, to funding.
- Identify key components of a well-written project.
- Identify other considerations when developing/planning a project.
- Identify facility fund sources and associated criteria/score.
- Identify misconceptions about the project processes.

**TRAINING AIDS:**

- Flip chart
- Markers
- PPT
- Examples of Projects for Class Activity

**HANDOUTS:**

- Quick Reference Guide to Fund Sources (Student Manual)
- Checklist for IMR Construction Projects (Student Manual)
- Project Management Information System (PMIS) Writing Tips (Student Manual)
- Fund Source Matrix




**FACILITATOR NOTES:**

- In Simulation




**POINTS TO REMEMBER:**

- 



	METHOD	CONTENT	TIME
	Presentation	<p><i>Lissa Spomer</i></p> <p><b>Objectives:</b></p> <ul style="list-style-type: none"> <li>Describe the project life cycle from requesting, formulating, to funding</li> <li>Identify key components of a well-written project</li> <li>Identify other considerations when developing/planning a project</li> <li>Identify facility fund sources and associated criteria/score</li> <li>Identify misconceptions about the project processes</li> </ul>	10 min.
	Presentation	<p><b>Project Creation</b></p> <ul style="list-style-type: none"> <li>How are projects identified?</li> <li>What should be considered?</li> <li>Project 101</li> </ul> <p><b>Discuss Fund source consideration</b></p> <ul style="list-style-type: none"> <li>Share the Fund Source Matrix</li> </ul> <p><b>Key Points</b></p> <ul style="list-style-type: none"> <li>Discuss: what if your project didn't get formulated?</li> <li>Discuss: what if your project is formulated?</li> </ul>	30 min.
	Activity	<p>In groups of 3 or 4, students will review a project. Answer these questions:</p> <ol style="list-style-type: none"> <li>What is your impression of this project?</li> <li>Does it seem to be a good or bad project and why?</li> <li>Could you improve on the project?</li> <li>Would you prioritize this project?</li> </ol>	10 min.



	METHOD	CONTENT	TIME
	Presentation	Project Funding <ul style="list-style-type: none"> <li>• Discuss the WBS structure</li> <li>• Key points on WBS               <ul style="list-style-type: none"> <li>◦ Make sure that locations are correct!!</li> </ul> </li> </ul>	5 min.
	Presentation	Project Execution <ul style="list-style-type: none"> <li>• Remind students of discussion in Budgeting at Park on reporting requirements</li> <li>• Closing work orders and Projects</li> <li>• Document all expenditures</li> </ul>	15 min.
	Presentation	Review Objectives	5 min
		Questions?	15 min



# BUDGETING AT YOUR PARK

---

**INSTRUCTORS/SPEAKERS:** Sandy Pusey/Lissa Spomer

**SESSION LENGTH:** 3 hours

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

- List the components of an FBMS Account number.
- Distinguish between the functions of AFS4 and FBMS.
- Explain the Account structure and how it tracks through AFS4, PAMP, FMSS, Annual Work Planning.
- List personal and non-personal factors to consider when programming Accounts.

**TRAINING AIDS:**

- PPT
- Flip Chart
- GREA Programming Budget and Personnel (Excel file)
- Student laptops

**HANDOUTS:**

- Account Numbers (student manual)
- FBMS Account Examples by Asset Type (student manual)
- FBMS Account Tracking graphic (student manual)
- SEOT Programming Case Study
  - 2014 Pay period Calendar
  - 2015 Pay period Calendar
  - Personal Service Calculator.xls
  - Pay/Benefit%/Current step and next step.xls.doc
  - Current GS Pay Scale Chart
  - Current WG/WS/WL Pay Scale Chart
  - Written Scenario (complete with pitfalls)
  - 1% Pay raise scenario


**FACILITATOR NOTES:**

- Keep the lecture/discussion of Introduction to Programming in AFS4 rather brief. It should introduce the students to the basic concepts they will see/experience during the AFS4 Demonstration that follows.



**POINTS TO REMEMBER:**

- 





	METHOD	CONTENT	TIME
	Presentation	<p><b>Park Budget Process</b></p> <p><i>Overview the steps</i></p> <ul style="list-style-type: none"> <li>• Step 1: Identifying the Need and Getting Money <ul style="list-style-type: none"> <li>◦ Ask for examples from the students <ul style="list-style-type: none"> <li>▪ Need: Budget Cost Projections (BCP) and PAMP</li> <li>▪ Money: OFS and PMIS</li> </ul> </li> </ul> </li> <li>• Step 2: Programming the Work</li> <li>• Step 3: Account for the Money</li> <li>• Step 4: Completing the Work, Reporting Status, and Evaluating</li> </ul> <p><i>Transition</i></p> <ul style="list-style-type: none"> <li>• “We will not be dealing with the first step (which is part of Budget Formulation) because you dealt with that during AFMP (PMIS), and OFS increases are rare.”</li> <li>• “The course will start from Programming the Money”</li> </ul>	10 min.



	METHOD	CONTENT	TIME
	Presentation	<p><b>Program Authorization – You get the money – Here are your Accounts</b></p> <ul style="list-style-type: none"> <li>• Programming for ONPS (Base) Funds are slightly more complicated than Project Funds, so we will be focusing on ONPS, with the idea you can apply what you learn about ONPS to project funds. <ul style="list-style-type: none"> <li>◦ Includes base funds and many types of project funds such as cyclic and repair/rehab.</li> </ul> </li> <li>• Purpose of Account numbers is to document how we spend \$</li> <li>• Anatomy of an Account number <ul style="list-style-type: none"> <li>◦ FBMS Account Function – Who (which division) is charging</li> <li>◦ Fund Source – Where the money comes from</li> <li>◦ Cost Element – What the funds are spent on</li> <li>◦ Refer to FBMS Functional Area list in student manual</li> </ul> </li> </ul>	20 min.
	Presentation	<ul style="list-style-type: none"> <li>• FBMS ACCOUNT Tracking [refer students to diagram] <ul style="list-style-type: none"> <li>◦ The FBMS ACCOUNT amounts that you put in FMSS are not put into AFS.</li> </ul> </li> <li>• Actuals, using FBMS ACCOUNTs, help inform your planning decisions (e.g., Compare your MZY amounts based on Optimizer Banding – how close are these numbers to the PAMP? If not close, should you adjust your work or should you adjust your PAMP?)</li> </ul>	10 min.








	METHOD	CONTENT	TIME
	Presentation	<b>Administrative Financial System (AFS4)</b> <ul style="list-style-type: none"> <li>• What is AFS4?</li> <li>• FMSS is for work activity tracking; AFS4 is for budget tracking.</li> <li>• The AFS4 is the parks' financial planning and record-keeping program (has a Commitment Control Register (CCR) and a Charge Card Log).</li> <li>• AFS4 includes a "crosswalk" between financial data and performance goals.</li> <li>• Using AFS4 assigns \$ amounts to various Account numbers (i.e., it determines how much work is planned for each Account number).</li> </ul>	10 min.
	Presentation	<b>Federal Finance System (FFS) Federal Business Management System (FBMS)</b> <ul style="list-style-type: none"> <li>• FBMS is an automated Accounting system used by the NPS and all of DOI for tracking obligations and expenditures.</li> <li>• FBMS amounts are actuals. You can compare FBMS reports with AFS4 to see how well you planned.</li> <li>• If FBMS is the "Bank," then AFS4 is your "Check Register."</li> <li>• FBMS is also now the "system of record" for tracking TCFO (real property costs)</li> </ul>	5 min.






	METHOD	CONTENT	TIME
😊	Discussion	<b>Right-sizing the number of Accounts</b> <ul style="list-style-type: none"> <li>It is up to <u>you</u> to talk to your AO and determine which and how many Accounts you have.</li> <li>You have to balance ease with accuracy (e.g., FM &amp; FO – b/c this wasn't correctly broken down, OMB accused parks of not doing work they claimed). <ul style="list-style-type: none"> <li>The Account someone is paid from COMMUNICATES what work they did (i.e., may not reflect reality).</li> </ul> </li> <li>"Because we're requesting at this level of detail, we need to report at the same level of detail."</li> </ul>	10 min.
😊	Discussion	<b>Introduction to Programming in AFS4</b> <ul style="list-style-type: none"> <li>When parks get Funding Advice/Program Authorizations, they program how the funds will be spent. <ul style="list-style-type: none"> <li>"Why does this need to be done in advance?"</li> </ul> </li> <li>Discussion: What things will you need to know when calculating how much an employee will cost over the course of a year? <ul style="list-style-type: none"> <li>Benefits percent; grade and step; how many hours they work; days of the week and hours of the day worked; furloughs; lump sum payments.</li> </ul> </li> </ul>	5 min



	METHOD	CONTENT	TIME
	Presentation	<ul style="list-style-type: none"> <li>Communicate with HR               <ul style="list-style-type: none"> <li>Find out if/when grade and step changes are going to occur, and adjust your estimates</li> <li>Find out benefits % for each employee (benefits %s differ)</li> <li>Personnel calendar</li> <li>Work Order Management</li> <li>Service Levels</li> </ul> </li> <li>The CCR application allows you to plan your work in the park-accepted database.               <ul style="list-style-type: none"> <li>The CCR is like your personal check log – it allows you to keep track of checks that you've written (or will write) but that haven't hit the bank Account (FBMS) yet.</li> <li>The program also allows you to plug in different pay grades / hours / materials costs to determine how much should be assigned to a specific Account.</li> </ul> </li> <li>As a Facility Manager, you should be involved in this planning process because it determines what work you can and cannot do.</li> </ul>	10 min.
	Activity	<p><b>Programming Practice</b></p> <p>NOTE: Provide instructions and have students read the case study before booting up their computers.</p> <p>In groups of three, have students complete the SEOT Programming Case Study.</p>	30 min.
	Debrief	There isn't a "right" answer, only degrees of accuracy. The best solution is to work with your AO to make sure you have the best estimate possible.	15 min.



	METHOD	CONTENT	TIME
	Presentation	<b>Accounting for the Money</b> <ul style="list-style-type: none"> <li>• <b>Discuss the ways that the money is reported</b> <ul style="list-style-type: none"> <li>○ FMSS, QuickBooks, FBMS, etc.</li> <li>○ Discuss reports to use for accounting <ul style="list-style-type: none"> <li>▪ Report examples walk through</li> </ul> </li> </ul> </li> </ul>	10 min
	Presentation	<b>Completion/Status of Work</b> <ul style="list-style-type: none"> <li>○ Importance of accountability</li> <li>○ Closeout</li> </ul> <b>Evaluate the Work</b> <ul style="list-style-type: none"> <li>• QA/QC</li> <li>• Work plan vs. Actuals</li> </ul>	10 min
	Presentation	<b>Questions</b>	5 min



# QUICK REFLECTION AND INSTRUCTOR EVALUATION (DAY 4)

---

**INSTRUCTORS/SPEAKERS:**

Course Coordinators

**SESSION LENGTH:**

30 min

**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:**

- Parking Lot Pads
- Instructor Evaluations (Booklet)






**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.



	METHOD	CONTENT	TIME
	Activity	<b>Quick Reflection</b> The students already have their Parking Lot pad— Give them time to jot down other thoughts. Collect papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.	5 min
	Discussion	<b>Group Discussion</b> <ul style="list-style-type: none"> <li>• Ask for responses.</li> <li>• Clarify the unclear; write key answers on flipchart to refer to throughout the course.</li> </ul>	5 min
 	Presentation Discussion	<b>Review Course Objectives and What to Expect</b> <ul style="list-style-type: none"> <li>• Review course content accomplished.</li> <li>• Review what objectives will be met tomorrow.</li> </ul>	4 min
	Presentation	<b>Homework</b> <ul style="list-style-type: none"> <li>• PMIS Project               <ul style="list-style-type: none"> <li>○ Each team is responsible for writing a PMIS narrative for constructing an elevator in the new Walker building.</li> <li>○ Teams are required to complete the Project Narrative section (description, justification, and measurable results portions).</li> </ul> </li> </ul>	18 min



# DAY 5: GOOD OF THE DAY

**INSTRUCTORS/SPEAKERS:**

Christy McCormick

**SESSION LENGTH:**

30 minutes

**TRAINING AIDS:**

- Parking Lot Q&A from yesterday.
- Prizes

**HANDOUTS:**




- Shackleton Dilemma (handout)

**FACILITATOR NOTES:**

- The purpose of the Good of the Day is to energize and instruct.
- Be attentive to the time.

**ANNOUNCEMENTS:**

- Mid-Term exam today.

	METHOD	CONTENT	TIME
	Presentation	Christy McCormick <b>Shackleton Dilemma Intro</b> <ul style="list-style-type: none"> <li>• Group students by region</li> <li>• Provide directions for the activity</li> </ul>	5 min
	Activity	<b>Prioritizing</b> Using the Shackleton Dilemma handout, groups are to come to a consensus about what they would take	5 min
	Discussion Debrief	<b>Debrief</b> Discuss "Answer" and suggest reflection on how your "Strengths" might have influenced your leadership in the group. Award prizes for the winning region!	10 min



# SHACKLETON ACTIVITY ANSWERS

Here are some of the decisions Shackleton made regarding which items should be taken from the sinking *Endurance* (compiled from written accounts of Shackleton's journey).

1	2	3	Item	1	2	3	Item
1			Artist's Oil Paints			3	Radio
1			Books	1			Reindeer skin sleeping bag
	2		Camera, film	1			Rifles, cartridges
	2		Canned meat	1			Rope
1			Compass	1			Sail canvas
1			Cooking pots	1			Sextant
		3	Cotton shirts			3	Ship's bell
1			Extra kerosene			3	Signal mirror
1			Extra lamp wicks			3	Sledges and dogs
		3	Flare pistol			3	Soccer ball
	2		Fresh water in canisters			3	Star charts
	2		Journals and pencils	1			Stove
1			Knives		2		Tents
1			Matches	1			Tools
1			Medical supplies	1			Wooden crates
		3	Pistols, cartridges	1			Woolen long underwear
1			Playing cards				





Shackleton's first concerns were for the necessities of life. Penguins and seals were easily hunted with rifles (1), so canned meat (2) was unnecessary. Pistols, however, would have been dead weight (3).

Fresh water (2) was essential, but heavy and bulky. Although sea ice is salty, glacial ice, iceberg fragments, and snow are plentiful sources of fresh water if there is a stove (1), kerosene (1), matches (1), and cooking pots (1) to melt them in.

Shelter includes staying warm. Rope (1) has many uses, including making replacement shelter for the flimsy tents (2) from sail canvas (1). Woolen long underwear (1) and reindeer skin sleeping bags (1) are warm when wet because they trap air. Cotton shirts (3) stay saturated and cold.

Some choices depended on the journey. The pack ice proved to be too rough for sledges (3), and the dogs (3) required too many provisions. (They were shot.) The lamp wicks (1) and artist's oil paints (1) were used to caulk the lifeboats, and the tools (1) and wooden crates (1) were essential to maintain the lifeboats.

Navigation to South Georgia depended on sextant (1) sightings of the sun, not stars; so star charts (3) were unnecessary. The value of medical supplies (1), knives (1), and a compass (1) are obvious.

Calling for help was not an option. Radio (3) was in its infancy in 1916, and Shackleton was too far from any rescuers for a signal mirror (3), a ship's bell (3), or a flare pistol (3) to be useful.

Shackleton was also concerned about the mental health of his men and included playing cards (1) and books (1) to help them through times when they were forced to lie low. Perhaps this explains why the extra weight of journals and pencils (2), and a camera and film (2), were permitted. But the soccer ball (3) would see little opportunity for use under these conditions.



# FIELD EXPERIENCE

---

**INSTRUCTORS/SPEAKERS:** Becca Renaud

**SESSION LENGTH:** 2 hours, 30 minutes

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

- Understand how the Capital Investment Strategy (CIS) drives project management and condition assessment priorities at LYJO.
- Discuss Optimizer Band for assets that are part of field experience.
- Describe projects that will assist the students in developing the AWP for Sea Otter Island National Park.
- Compare LYJO Special Events to SEOT Special Events.
- Identify seasonality and flow of work implications.
- Apply information learned in the field experience to the SEOT AWP presentation.

**TRAINING AIDS:**

- None

**HANDOUTS:**

- Field Notes (notebook)

**FACILITATOR NOTES:**

- This field experience should allow the students an understanding of how LYJO's operations and work approaches can influence the student teams' preparation of the SEOT AWP.

**POINTS TO REMEMBER:**

- The students have a homework assignment
  - Please refer to this when designing and conducting the field experience

**INSTRUCTIONAL METHODS:**



Activity



Debrief



Discussion



Instructor Management



Presentation



Prezi



Video



	METHOD	CONTENT	TIME
		Becca Renaud	
		[Lesson/Activities TBD]	

## Homework

### LYJO AND SEOT IMPLICATIONS

**Directions:** Read the following questions and consider what you saw and heard today during the field experience at LYJO. This homework sheet is due tomorrow morning.

1. What best practices did you see at this park that you would incorporate into your SEOT AWP?
2. What work processes did you find most interesting during the field trip today? How effective were those processes, and what would you change, if anything?
3. What strategic directives did you learn about during the field experience, and how will they affect your approach to the SEOT AWP?



# WELLBEING AND WORK-LIFE BALANCE

---

**INSTRUCTORS/SPEAKERS:** Sandy Pusey and Mark Tezel

**SESSION LENGTH:** 1 hour

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

- Recognize the importance of work-life balance to personal and employee wellbeing.
- Recognize the ways in which work-life balance may affect your leadership abilities.
- Identify resources available to assist with adding work-life balance components to your everyday life.
- Touch base on work-life balance during DLS #1 and identify strategies for AFMP and beyond.

**TRAINING AIDS:**

- None

**HANDOUTS:**

- None

**FACILITATOR NOTES:**

- This session should be very conversational and help students prepare for taking time over the weekend to explore Marble Falls or other surrounding towns while checking in with instructor team and working on their AWP.

**POINTS TO REMEMBER:**

- This session will be in the field directly following the LBJ field experience.



	METHOD	CONTENT	TIME
☺	Discussion	<p>Start the conversation by asking:</p> <ul style="list-style-type: none"><li>• What strategies did you use to manage your work-life balance?</li><li>• How has using your FitBit fit into your strategy?</li><li>• Use the analogy of having started a marathon at Principles of Asset Management: How are you doing in your training to complete the marathon? Did you have any injuries along the training route?</li><li>• Discuss strategies to find work-life balance over the weekend, make a schedule with your teammates and take time to relax and enjoy some of the local offerings.</li><li>• Plan for your mandatory check-ins with the instructor team. This is to make sure you are on track, doing OK, and not going down any rabbit holes.</li></ul>	



# MENTOR BRIEFING

---

**INSTRUCTORS/SPEAKERS:** Course Coordinators

**SESSION LENGTH:** 1 hour

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

- Understand the FMLP students' progress during Week 1
- Articulate their role in the SEOT simulation for Week 2
- Be oriented to the Week 2 agenda

**TRAINING AIDS:**

- N/A

**HANDOUTS:**

- Mentor Manuals

**FACILITATOR NOTES:**

- Most of this session should be conversational! Please allow for a lot of Q&A time.
- Mentors who were a part of the simulation last year, or a mentor from a previous year, will need to refrain from sharing any previous knowledge to protect confidentiality. In addition, the simulation material has changed this year, and we do not want students misled in any way.

**POINTS TO REMEMBER:**

- Mentors should take Mentor Manuals before they leave the BBQ.
- The rest of the mentor materials will be given on Monday.



## WEEK TWO

---

### Lesson Plans



# DAY 6: WEEK 2 OPENING AND ANNOUNCEMENTS

---

**INSTRUCTORS/SPEAKERS:** Course Coordinators

**SESSION LENGTH:** 30 minutes

**TRAINING AIDS:**

- None

**HANDOUTS:**

- N/A

**FACILITATOR NOTES:**



- Remind students their homework is now late if not submitted online:
  - Morning Meeting Toolkit

**POINTS TO REMEMBER:**

- N/A





	METHOD	CONTENT	TIME
	Debrief	<b>Announcements</b> Opening of the week, review Quick Reflection Papers from Friday. Welcome Mentors and Bob Wilbur! <ul style="list-style-type: none"> <li>Remind students that homework is now late and should be submitted on the e-portfolio site.</li> </ul>	10 min
	Activity	<b>Reconnecting Activity-10 Things in Common</b> <ul style="list-style-type: none"> <li>Ask the students to find their mentors and stand beside them.</li> <li>Then have the group count off by eight.</li> <li>Once they get into their groups, ask them to find 10 things they all have in common.</li> <li>Rules:               <ul style="list-style-type: none"> <li>It cannot have anything to do with work</li> <li>No body parts (we all have arms, we all have legs)</li> <li>No clothing (we are all wearing shoes)</li> <li>This helps the group explore shared interests more broadly rather than settling for an easy list of obvious commonalities</li> <li>One person must take notes and be ready to read their list to the group</li> <li>After 7 minutes, reconvene the group and have them read their lists</li> </ul> </li> </ul>	20 min



# WRITING WORKSHOP

---

**INSTRUCTORS/SPEAKERS:** Dr. Dana Anderson

**SESSION LENGTH:** 4 hours

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

- Provided by speaker.

**TRAINING AIDS:**

- N/A

**HANDOUTS:**

- N/A

**FACILITATOR NOTES:**

- N/A

**POINTS TO REMEMBER:**

- N/A



# DLS #2 PLANNING

**INSTRUCTORS/SPEAKERS:**

Christy McCormick

**SESSION LENGTH:**

1 hour

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

- Articulate their responsibilities for the DLS #2.
- Provide feedback to the course coordinators.

**TRAINING AIDS:**

- Sample Portfolio
- Sample Posters
- Flipcharts with Subject and dates with lines underneath for students to sign up
- *Questions of Character* (textbook)

**HANDOUTS:**

- DLS #2 Materials (all in Student Manual)
- Assignments and Assignment Descriptions (Student Manual)
- Developmental Activity (Student Manual)
- Poster Guidance (Student Manual)
  - Poster Critique Worksheet (Student Manual)
- Portfolio Guidance (Student Manual)

**FACILITATOR NOTES:** *This session is intended to:*



- Provide information and materials for DLS #2.
- Provide students with next steps logistics.

**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.
- 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 them 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 they can talk to, 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.

	METHOD	CONTENT	TIME
	Presentation	Christy McCormick <b>Introduction</b> <ul style="list-style-type: none"> <li>• Review the objectives</li> </ul>	5 min



	METHOD	CONTENT	TIME
 	Presentation Discussion	<p><i>Christy McCormick</i></p> <p><b>Webinars:</b></p> <ul style="list-style-type: none"> <li>You will still be attending Leadership webinars each month</li> <li>Instead of Operations webinars, we are turning the camera on you! Each month, two topics will be presented based on a reading we give you. For example, if you sign up for Sustainability Chapter 9, your team will present that topic twice in a month. There are signup sheets placed around the room, so at the end of this session, you will sign up for one topic.</li> </ul> <p><b>Directed Field Experience:</b></p> <ul style="list-style-type: none"> <li>In your SEOT teams, you will be traveling to a park to assist them in developing an Annual Work Plan. Your park assignments will be given to you on Thursday night.</li> <li>Working with your park, you will select a week during January or early February to travel.</li> </ul> <p><b>DLS #2 Planning</b></p> <ul style="list-style-type: none"> <li>RDA #2 - Planning to make the most of it <ul style="list-style-type: none"> <li>If you traveled for your first developmental activity, you will conduct your second developmental activity in your park.</li> <li>If you did not travel for your first developmental activity, you may travel to your mentor's park.</li> <li>Your Developmental Activity should focus on your competency needs and should be an opportunity for you to stretch out of your current position in the park.</li> </ul> </li> <li>Assignments - Webinars <ul style="list-style-type: none"> <li>You will continue to attend Leadership Webinars</li> </ul> </li> </ul>	25 min



	METHOD	CONTENT	TIME
😊	Discussion	<p><i>Christy McCormick</i></p> <p><b>Capstone Course of Study in Facility Management Planning</b></p> <ul style="list-style-type: none"> <li>• Capstone Poster</li> <li>• Capstone Portfolio</li> <li>• What to expect at Capstone</li> </ul>	20 min
😊	Discussion	<p><i>Christy McCormick</i></p> <p><b>Recap</b></p> <ul style="list-style-type: none"> <li>• Review DLS #2 agenda items from day with Q&amp;A.</li> </ul>	5 min



# HOW TO FACILITATE AN API EXERCISE (STUDENTS)

---

**INSTRUCTORS/SPEAKERS:** Jenny Dems  
Christy McCormick

**SESSION LENGTH:** 1 hour

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

- Describe the importance of an accurate API Score
- Use the API Offline tool
- Describe best practices in facilitation
- Facilitate a group in the API Process as a team

**TRAINING AIDS:**

- PPT
- Flip Chart with the Criteria filled out

**HANDOUTS:**

- API Facilitation Rubric (Appendix: SM)
- Facilitation Planning Checklist (SM)
- API HQ Buildings (Excel Calculator on the AFMP E-portfolio site)

**FACILITATOR NOTES:**




This session serves multiple purposes. It:

- Introduces the concept of API. The students should be well aware of the criteria as they were required to take the API e-course
- Helps students understand and practice good facilitation practices
- Helps the students to understand the role of the mentor
- Allows them some planning time during the session to figure out goals and outcomes for the facilitation




**POINTS TO REMEMBER:**

- Ensure that the Flipchart with the criteria is hidden



	METHOD	CONTENT	TIME
	Activity	<p><i>Jenny Dems</i>  <b>Shout Out</b>            Activity: Criteria of the API- Have the students shout out the criteria of the API</p> <ul style="list-style-type: none"> <li>-Natural Resource Preservation</li> <li>-Cultural Resource Preservation</li> <li>-Visitor Use</li> <li>-Park Support</li> <li>-Asset Substitutability</li> </ul>	5 min.
	Presentation	<p><b>About the API</b></p> <ol style="list-style-type: none"> <li>1. Tie-in with the Capital Investment Strategy</li> <li>2. Call-to-Action</li> </ol>	10 min.
	Presentation	<p><i>Christy McCormick</i>  <b>About Facilitation</b></p> <ul style="list-style-type: none"> <li>• Facilitator defined               <ul style="list-style-type: none"> <li>○ Ease the process</li> <li>○ Neutrality (If you are in the role of facilitator you cannot contribute to the content)</li> </ul> </li> <li>• What do you as a facilitator do?               <ul style="list-style-type: none"> <li>○ Design and Plan-Guiding Questions                   <ul style="list-style-type: none"> <li>▪ What is the outcome?</li> <li>▪ How do I involve my audience?</li> <li>▪ Do I want a structured process?</li> <li>▪ How do I get them to reach consensus?</li> <li>▪ What materials do I need for the facilitation?</li> <li>▪ What do they need to know at the outset?</li> </ul> </li> <li>○ Guide and Control the event                   <ul style="list-style-type: none"> <li>▪ Set the ground rules if any</li> <li>▪ Listen and engage</li> </ul> </li> <li>○ Record and Action                   <ul style="list-style-type: none"> <li>▪ Make sure you record all decisions so that the whole group can see</li> </ul> </li> </ul> </li> </ul>	10 min.



	METHOD	CONTENT	TIME
	Presentation	<b>About the Process</b> <ul style="list-style-type: none"> <li>• Design and Plan</li> <li>• Guide and Control</li> <li>• Record and Action</li> </ul> <p>Using the worksheet provided, fill in the guiding questions you might ask and how you plan on guiding and controlling the process. How about recording?</p>	5 min.
	Presentation	<i>Jenny Dems</i> <b>Things to Remember</b> <ul style="list-style-type: none"> <li>• Each team member must take a turn facilitating</li> <li>• Each team must stay “in-simulation” (the mentors are not your mentors, but rather members of park management)</li> <li>• Rubric</li> </ul>	5 min
	Activity	<b>Planning Time</b> <ul style="list-style-type: none"> <li>• The teams should take this time to plan strategy and gather materials for the facilitation.</li> </ul>	25 min





# HOW TO FACILITATE AN API EXERCISE (MENTORS)

---

**INSTRUCTORS/SPEAKERS:**

Pusey/Tezel

**SESSION LENGTH:**

1 hour

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

- Describe the importance of an accurate API Score
- Use the API Offline tool
- Describe best practices in role play in facilitation
- Form the mentor team to best encourage student learning in facilitation and understanding of the API

**TRAINING AIDS:**

- PPT
- Flip Chart with the Criteria filled out

**HANDOUTS:**

- API Facilitation Rubric (Appendix: SM)
- Facilitation Planning Checklist (SM)
- API HQ Buildings (Excel Calculator on the AFMP E-portfolio site)
- Role-playing cards

**FACILITATOR NOTES:**




This session serves multiple purposes. It:

- Introduces the concept of API. The students should be well aware of the criteria as they were required to take the API e-course
- Helps students understand and practice good facilitation practices
- Helps the students to understand the role of the mentor
- Allows them some planning time during the session to figure out goals and outcomes for the facilitation




**POINTS TO REMEMBER:**

- Frame the session by saying that it is assumed that the mentors understand API and Capital Investment Strategy, but we are reviewing this information so that you will be better prepared for the role play



	METHOD	CONTENT	TIME
	Activity	<p><i>Christy McCormick</i></p> <p><b>Shout Out</b></p> <p>Activity: Criteria of the API- Have the students shout out the criteria of the API</p> <ul style="list-style-type: none"> <li>-Natural Resource Preservation</li> <li>-Cultural Resource Preservation</li> <li>-Visitor Use</li> <li>-Park Support</li> <li>-Asset Substitutability</li> </ul>	5 min.
	Presentation	<p><b>About the API</b></p> <p>Tie-in with the Capital Investment Strategy</p> <p>Call-to-Action</p>	10 min.
	Presentation	<p><b>About Facilitation</b></p> <ul style="list-style-type: none"> <li>• Facilitator-defined             <ul style="list-style-type: none"> <li>○ Ease the process</li> <li>○ Neutrality (If you are in the role of facilitator you cannot contribute to the content)</li> </ul> </li> <li>• What do you as a facilitator do?             <ul style="list-style-type: none"> <li>○ Design and Plan</li> <li>○ Guide and Control the event</li> <li>○ Record and Action</li> </ul> </li> </ul>	10 min.



	METHOD	CONTENT	TIME
	Presentation	<b>You as a role-player</b> <ul style="list-style-type: none"> <li>• AFMP has been designed as much more immersive and less passive</li> <li>• We believe if the student learns about API and actually has to facilitate the process, the result will be increased learning</li> <li>• Changing your role from mentor to role-player — Some things to remember: <ul style="list-style-type: none"> <li>○ You may be an expert in API, but you will be acting as a division chief who probably does not have the same level of understanding. You will need to decide BEFORE tomorrow what your level of understanding of the API will be (e.g., as Chief of Resources at a park, what should you know about the API?)</li> <li>○ Don't make things too easy on the student, but don't be a jerk either</li> <li>○ Make sure that you are listening to them as facilitators</li> </ul> </li> </ul>	10 min.
	Presentation	<b>Things to Remember</b> <ul style="list-style-type: none"> <li>• Each team member must take a turn facilitating, so make sure you don't interrupt the transition from one team member to the other</li> <li>• Each team must stay "in-simulation" (the mentors are not your mentors, but rather members of park management)</li> <li>• Rubric</li> </ul>	5 min
	Activity	<b>Planning Time</b> <ul style="list-style-type: none"> <li>• The mentors should take this time to decide which role they will play</li> <li>• The mentors should also take this time to review the API Offline tool</li> </ul>	20 min



# STRENGTHS BASED LEADERSHIP FOR MENTORS (MENTOR WORKSHOP I)

---

**INSTRUCTORS/SPEAKERS:** Steve Wolter  
Sandy Pusey

**SESSION LENGTH:** 2 hours and 15 minutes

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

- Review homework that identified their leadership strengths and understand how they influence the relationships within a team or organization.
- Clarify how individual differences in leadership strengths can be used in leading teams, groups, and organizations.
- Understand how the overall leadership strengths of a team or organization, and conversely the leadership gaps of a team or organization, can affect the team and group work phases of ideation, elaboration, execution, and evaluation.
- Synthesize leadership concepts and theory from Daft, lectures, readings, and other FMLP experiences to establish leader competence and capacity of a team or organization.
- Apply specific strengths from themselves and an assigned team in an assigned park unit scenario, completing all assignments using the team's strengths as a basis for work.

**TRAINING AIDS:**

- Strengths Based Leadership Strength Finders Assessment
- Strengths Based Leadership Report (Results from assessment)
- Post-it notes
- Poster paper and flip charts
- Student workbook
- FMLP Journey Chart (Butcher Paper)
- Top 5 SBL Team Grid poster size for each team and FMLP Leadership Team
- Stickers (4 or 5 different colors)
- Different color thick marker for each mentor
- Positive Impact Test and "Drop in Your Bucket" post-it notes

**HANDOUTS:**

- Custom Team Distribution Chart
- Team Top 5 Grid
- Theme Descriptions
- Drop in the Bucket Forms



**FACILITATOR NOTES:**

Engaging the mentors in this important topic is essential for them to understand how the simulation teams may better attain overall success, but more importantly how to synthesize much of the leadership knowledge and information they have been given to date. The ability of the group to apply their knowledge and skills in leadership to a practical scenario will be evidenced in the simulation as behaviors are observed and noted by the instructional team.




This session uses a combination of lecture, class discussion, small group discussion, and values clarification delivery methods to allow mentors to meet the session objectives. The facilitation must be flexible in order to allow mentors to feel comfortable exploring the concepts of strengths-based leadership and to apply those concepts to differing situations. Facilitation should also encourage mentors to feel comfortable sharing information with others in small groups and/or with the entire class.

Generally, the class should be taught using a fishbowl setup to allow groups to leave the circle for small group work and then return for larger group discussion and lecture. Flip charts should be provided for each work group as a home base to return to, and the handouts and topics should be presented in the progression as shown in the teaching outline.

**POINTS TO REMEMBER:**

- Every individual has leadership strengths and competencies
- The leadership competencies are not strengths and vice-versa
- Leadership capacity is unlimited and can be developed, which will strengthen overall leadership competency
- There are no leadership strengths that are better than others




	METHOD	CONTENT	TIME
	Activity	<b>Review Leadership Journey of Mentors</b> <i>Sandy Pusey</i> <ul style="list-style-type: none"> <li>• Demonstrate the graphic representation process using butcher paper display. Each student will chart their leadership journey to date using different color magic marker.</li> <li>• Have mentors complete the process en masse.</li> <li>• Review as a large group and ask for comments.</li> </ul>	40 min
	Discussion	<b>Introduce Strengths Based Leadership Concepts and Basis</b> <i>Sandy Pusey</i> <ul style="list-style-type: none"> <li>• Introduce SBL content, and using prior assignments, review and discuss.</li> <li>• Objective is to tease out the important points of SBL to determine whether mentors have grasped and used this information.</li> </ul>	10 min
	Discussion	<b>Review Daft's "Leader as an Individual" Concepts and Group-Team Leadership Concepts</b> <i>Steve Wolter</i> <ul style="list-style-type: none"> <li>• Review Daft's concepts of leader as individual, impact of personality and preferences on leader's competency, FM leadership competencies, and the lecture from prior AFMP leadership sessions on group dynamics and function.</li> <li>• Remind mentors of these concepts using existing graphics from the Student Manual, or drawing upon prior webcasts and Principles course.</li> </ul>	5 min



	METHOD	CONTENT	TIME
☺	Facilitated Class Discussion, Case Study of Group Sharing, and Observation	<b>Discuss Strengths Based Leadership Tool and Application</b> <i>Steve Wolter</i> <ul style="list-style-type: none"> <li>• Review SBL tools and summary of themes to mentors</li> <li>• Have mentors gather in SEOT assigned teams</li> <li>• The FMLP training team will show their SBL team grid and model excellent behavior in this situation by briefly sharing their SBL impacts and concepts <ul style="list-style-type: none"> <li>◦ Listen more than talk</li> <li>◦ Do NOT interrupt</li> <li>◦ Foster open, creative discussion</li> <li>◦ Value all input</li> <li>◦ Keep confidences</li> <li>◦ Have fun</li> </ul> </li> <li>• At their tables, have each SEOT Simulation team chart their Top 5 chart (in poster form) using a distinct sticker color for each person (need colored dots)</li> <li>• Ask mentors to recreate exercise they just observed and share their individual themes from SBL and what it means to them</li> <li>• Have each SEOT Simulation team discuss their SBL themes with the whole group.</li> </ul>	45 min



	METHOD	CONTENT	TIME
	<b>Activity</b>  <b>Poster for each SEOT Team SBL Themes for discussion: what it means</b>	<b>Group-Team Distribution Chart and Action Strategy Planning</b> <i>Sandy Pusey</i> <ul style="list-style-type: none"> <li>• Introduce mentors to team distribution chart and examine what it may mean to tasks/duties associated with SEOT and field work; discuss what action strategy planning is</li> <li>• Allow SEOT teams to gather again and work on developing their team distribution chart further by synthesizing action strategies for a) potential situations, b) overall work group and team functions, c) changing conditions, etc. The group should identify possible action strategies to address anticipated situations and general work group functions.</li> </ul>	30 min





	METHOD	CONTENT	TIME
☺	Discussion	<p><b>Application and Synthesis</b>  <b>Use of Teamwork in Simulation - Application</b>  <i>Steve Wolter</i></p> <ul style="list-style-type: none"> <li>• Entire class reviews by sharing any results or insights they have had</li> <li>• Define work group vs. team from Daft; review 2 roles of leaders in groups-teams, and discuss facilitation tools.</li> <li>• Discuss how the SBL concept can work in their current workplace. In new virtual or place-based work groups?</li> <li>• Conclusion of SBL</li> <li>• Discuss positive impact of leaders, regardless of theme or style, and positive impact test</li> <li>• Give out “drop in your bucket” post-it notes</li> <li>• Have mentors discuss positive impact test as homework for next day, good of the day</li> <li>• Remind mentors that the simulation is a leaderless group, or team (depending upon their choices) activity</li> </ul>	20 min



# DAY 7: GOOD OF THE DAY AND ANNOUNCEMENTS

**INSTRUCTORS/SPEAKERS:** Mark Tezel

**SESSION LENGTH:** 30 minutes

**TRAINING AIDS:**

- None

**HANDOUTS:**

- N/A

**FACILITATOR NOTES:**

- N/A

**POINTS TO REMEMBER:**

- Provide students with the opportunity to clarify any aspects of yesterday that were unclear, as per Quick Reflection Papers.

**ANNOUNCEMENTS**

- Review daily agenda

	METHOD	CONTENT	TIME
☺	Discussion	Review Daily Agenda	3 min
☺	Discussion	<p><i>Mark Tezel</i></p> <p><b>Parking Lot Q&amp;A from previous day</b></p> <p>Answer lingering questions from Parking Lot pads collected the day before.</p> <p>Split mentors and students into groups and direct one group to the Event Center for the API Facilitation</p>	15 min



# RE-OPTIMIZATION WORKSHOP

**INSTRUCTORS/SPEAKERS:** Mark Tezel

**SESSION LENGTH:** 2 hours

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

- Understand and explain basic concepts of the re-optimization process including why, how, and when to re-optimize.
- Demonstrate proficiency in re-optimizing a park's assets.

**TRAINING AIDS:**

- Re-optimization tool (E-portfolio site)
- Re-optimization book answer (E-portfolio site)

**HANDOUTS:**


- N/A

**FACILITATOR NOTES:**



- N/A

**POINTS TO REMEMBER:**

- N/A

	METHOD	CONTENT	TIME
	Presentation	Mark Tezel Discuss OBs, process, why we do it, what the different OBs mean, floor levels for OB 1-3, and setting requirements.	30 min



	METHOD	CONTENT	TIME
	Activity	<p><b>Re-Optimization</b> Students will be given SEOT data and will have one hour to re-optimize.</p> <p>Students will be broken into their SEOT teams</p> <ul style="list-style-type: none"> <li>• Give instructions to re-optimize the assets at the Lukanin Homestead. <ul style="list-style-type: none"> <li>◦ With the greater interest at the Lukanin Homestead, the park will need to re-optimize because those assets are a higher priority now.</li> </ul> </li> </ul>	60 min
	Debrief	<p><b>Positioning</b></p> <ul style="list-style-type: none"> <li>• How did you come up with this score? (every team reports out)</li> <li>• Take major assets (Lukanin Main House, The Machine Shed, Apple Orchard) and have each team discuss their scoring and OBs.</li> </ul> <p>Provide book answer for the rest of re-optimization</p>	30 min



# MENTORING COMPETENCIES WORKSHOP (MENTOR WORKSHOP II)

---

**INSTRUCTORS/SPEAKERS:**

Steve Wolter  
Sandy Pusey

**SESSION LENGTH:**

2 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 with a focus on protégé preferences to identify gaps, and create workable solutions for problems.
- Review SEOT simulation and understand mentor role.
- Review assignments for DLS #2.
- Review Capstone in Facility Management course.

**TRAINING AIDS:**

- Flipchart
- PowerPoint

**HANDOUTS:**

- Mentor Competency and Functions (Handout)
- Facility Management Competencies (they should bring them with them)
- AWP Oral Presentation Rubric (Handout)
- Sticky notes
- Instructor Evaluations (Handout)
- FMLP Mentoring Assessment: Mentor Version
- Protégé/Mentor Assessment and IP grids (handout and transparency)




**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.
- Use the SEOT Presentation Dry Run Lesson Plan in this session.








	METHOD	CONTENT	TIME
	Presentation	<i>Sandy</i> <b>Welcome and Thanks</b>	10 min
 	Presentation Activity	<p><i>Sandy Pusey</i> <b>Mentor Self-Assessment</b></p> <ul style="list-style-type: none"> <li>• This assessment is dependent upon the protégé completing the mentor assessment form early in the AFMP course and plotting the results in <u>advance</u> for: <ul style="list-style-type: none"> <li>◦ Each protégé on a separate I/P grid.</li> <li>◦ The group of protégés on an I/P grid.</li> </ul> </li> <li>• Provide a quote to start activity.</li> <li>• Explain purpose of self-assessment. <ul style="list-style-type: none"> <li>◦ Research-evaluation for program managers.</li> <li>◦ Course correction for mentor-protégé relationship.</li> </ul> </li> <li>• Review confidentiality of assessment. <ul style="list-style-type: none"> <li>◦ Gathered to collect data.</li> <li>◦ Returned to mentors for possible future use.</li> </ul> </li> <li>• Advise that this assessment be the basis for discussion with student protégés at lunch to improve mentor performance and better meet protégé needs</li> <li>• Copy of completed mentor self-assessment</li> <li>• Review the individual mentor results.</li> </ul>	15 min





	METHOD	CONTENT	TIME
	Presentation	<p><i>Sandy Pusey</i></p> <p><b>Protégé-Mentor Effectiveness Assessment</b> (debrief; evaluate self-assessment exercise)</p> <ul style="list-style-type: none"> <li>• Hand out individually charted I/P grids for each protégé. Have mentor overlay their individually charted I/P grid on top of the protégé's.</li> <li>• Review flip chart of protégé's group responses to self-assessment form on I/P grid.</li> <li>• Overlay protégé's group responses to self-assessment form on I/P grid using post-it notes.</li> <li>• Discuss looking for trends and possible actions mentors can take, referring them to their individual protégé's assessment I/P grid.</li> <li>• Suggest that mentors use the individual protégé's I/P grid for discussion at lunch meeting.</li> </ul>	15 min
 	Presentation Discussion	<p><i>Steve Wolter</i></p> <p><b>Protégé Self-Assessment of FM Competencies, and FM Candidate Exit Interview Form</b></p> <ul style="list-style-type: none"> <li>• Review self-assessment by protégé.</li> <li>• Review FMLP Candidate exit interview form, BARS concepts, and relationship to competencies.</li> <li>• Compare and contrast the competencies and exit interview form.</li> <li>• Discuss role of mentor in self-assessment, use of competencies for self-assessment, and mentor's input on exit interview.</li> </ul>	15 min




	METHOD	CONTENT	TIME
 	Presentation Discussion	<p><i>Sandy Pusey</i></p> <p><b>IDP and RDA: Planning with Your Protégé</b></p> <ul style="list-style-type: none"> <li>IDP should include classes and other developmental assignments – it does not need to identify required courses from the FMLP curriculum.</li> <li>RDA and reminders about what makes a good RDA and the mentor's role in RDA development.</li> <li>Share Developmental Activity Rubric.</li> </ul>	15 min
 	Presentation Discussion	<p><i>Steve Wolter</i></p> <p><b>SEOT Simulation</b></p> <ul style="list-style-type: none"> <li>Process reminder from pre-AFMP webcast about what a simulation is.</li> <li>Outline the mentor role and remind them of limits on their "solving" the simulation.</li> <li>Discuss role-playing function during API facilitation activity focusing on role playing and observation, delivering critique AFTER the API facilitation session.</li> <li>Discuss the differences between solving and guiding, and outline on flip chart the findings of the discussion.</li> <li>Rubrics (Oral Presentation Rubric, LCBP I, II, III skills, Other Competencies Measured, Rubric, Self- and Team-Assessment); how to coach for grading.</li> <li>Purpose of dress rehearsal and mentor role.</li> </ul>	10 min
	Presentation	<p><i>Steve Wolter</i></p> <p><b>Peer Learning Concepts</b></p> <ul style="list-style-type: none"> <li>Opportunity for mentors to teach and learn from each other.</li> <li>Different from teacher-student interaction (less formal).</li> <li>Provides authenticity to what is learned.</li> <li>Uses nominal group process-flip chart activity</li> </ul>	10 min






	Activity	<div>Steve Wolter</div> <div>Flipchart Activity</div> <div><ul style="list-style-type: none"><li>• Introduce Flipchart Activity and quickly form small groups.</li><li>• Ask mentors to reflect privately and then discuss briefly:<ul style="list-style-type: none"><li>• <i>What worked and what didn't work in their communication strategy with protégé?</i></li><li>• <i>What worked and what didn't work in document and work review?</i></li><li>• <i>What worked and what didn't work about the e-portfolio?</i></li><li>• <i>What worked and what didn't work about your protégé's developmental activity?</i></li><li>• <i>What worked and what didn't work about monthly Breeze Sessions or Discussion Boards?</i></li></ul></li><li>• Report most notable items that worked from the group (top 5) on the flip chart.</li><li>• Report out to the whole group.</li></ul></div> <div><table><tr><td>1.Regular meeting time did not work</td><td>Adjust meeting time</td></tr><tr><td>2. Giving time to mentor to review drafts</td><td>Provide 5 work days to review and provide suggested edits on work products</td></tr><tr><td>3. xxxx</td><td>xxxxx</td></tr></table></div>	1.Regular meeting time did not work	Adjust meeting time	2. Giving time to mentor to review drafts	Provide 5 work days to review and provide suggested edits on work products	3. xxxx	xxxxx	20 min
1.Regular meeting time did not work	Adjust meeting time								
2. Giving time to mentor to review drafts	Provide 5 work days to review and provide suggested edits on work products								
3. xxxx	xxxxx								
	Debrief	<div>Sandy Pusey</div> <div>Debrief</div> <div><ul style="list-style-type: none"><li>• Discuss the feasibility of the solutions identified.</li><li>• Record information with a promise to send out later.</li></ul></div>	15 min						



	Presentation	<p><i>Steve Wolter</i></p> <p><b>Mentoring Competencies</b></p> <ul style="list-style-type: none"> <li>• <b>Use the handout “Mettle of a Mentor” about mentoring and relate it to FMLP mentor competencies</b></li> <li>• Explain that this session is for taking stock of where you are and determining whether it is where you want to be.</li> <li>• Have mentors read 1<sup>st</sup> page and debrief (i.e., observations, what went wrong)</li> <li>• Review case and compare to the Mentor Competencies</li> </ul> <p><b>Review/Discussion of Mentoring Competencies</b></p> <ul style="list-style-type: none"> <li>• Review these from Principles of Asset Management – should be in their Mentor Manual already</li> <li>• Principles of Adult Mentoring Self-Rating <ul style="list-style-type: none"> <li>○ Use mentor assessment as a mentor form of BARS; review with the mentors by <ul style="list-style-type: none"> <li>▪ Review in workbook</li> <li>▪ Small group discussion by section</li> <li>▪ Report out by each group</li> </ul> </li> <li>○ Summarize with use of this tool as a supervisor and mentor development program aid.</li> </ul> </li> </ul>	1 hr
---	--------------	---	------



	Presentation	<p><i>Sandy Pusey</i></p> <p><b>The Final Stretch-</b></p> <ul style="list-style-type: none"><li>• <b>What we learned today</b><ul style="list-style-type: none"><li>○ Review main points</li><li>○ What information protégé and mentor assessment gave us and how we can use it</li><li>○ RDA – IDP – Exit Interview</li><li>○ SEOT</li><li>○ <b>Mentoring Competencies</b></li></ul></li><li>• Keeping the Drive Alive</li><li>• DLS #2 and Capstone Planning</li><li>• Final Questions/Concerns</li></ul>	10 min
---	--------------	--	--------



# DAY 8: GOOD OF THE DAY AND ANNOUNCEMENTS

**INSTRUCTORS/SPEAKERS:** Course Coordinators

**SESSION LENGTH:** 15 minutes

**TRAINING AIDS:**

- None

**HANDOUTS:**

- N/A

**FACILITATOR NOTES:**

- N/A

**POINTS TO REMEMBER:**

- Provide students with the opportunity to clarify any aspects of yesterday that were unclear, as per Parking Lot Pads.
- Remind that AWP workbooks are due!

**ANNOUNCEMENTS**

- Review daily agenda

	METHOD	CONTENT	TIME
☺	Discussion	Review Daily Agenda	3 min
☺	Discussion	<i>Steve Wolter</i> <b>Parking Lot Q&amp;A from previous day</b> Answer lingering questions from Parking Lot pads collected the day before.	15 min



# PRESENTING YOUR ANNUAL WORK PLAN

---

**INSTRUCTORS/SPEAKERS:**

Steve Wolter

**SESSION LENGTH:**

1 hour

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

- Articulate the structure of the oral presentations
- List important presentation skills (i.e., what is the level of understanding and interest of your audience? What is your point and why is it relevant to me?)

**TRAINING AIDS:****HANDOUTS:**

- Presentation Guidelines

**FACILITATOR NOTES:**

- Clarify what students should be talking about during their presentation
- Discuss what they believe the goals of the presentation are – redirect as necessary
- This should take the format of a squad meeting

**POINTS TO REMEMBER:**

**Introduction:**

*I gave you presentation guidelines last week, so you should already have a good idea of what is required. I know this is your first presentation to the management in the park and you may be a little nervous, so we wanted to talk to you a little about some stuff I've learned over the years to put your mind at ease. These are just our tips, you can take 'em or leave 'em, but I really believe, if you're willing to take 'em, it will make your presentation a million times better.*

	METHOD	CONTENT	TIME
☞ 😊	Presentation Discussion	<ul style="list-style-type: none"> <li>Review structure of oral presentation (45 min, everyone in the group should speak for an equal period of time)</li> <li>Who will be evaluating your oral presentations?               <ul style="list-style-type: none"> <li>Christy McCormick</li> <li>Steve Wolter</li> <li>Sandy Pusey</li> <li>Mark Tezel</li> <li>Jenny Dems</li> </ul> </li> <li>Who will be evaluating your final written product?               <ul style="list-style-type: none"> <li>Name evaluators</li> </ul> </li> <li>Important Presentation skills               <ul style="list-style-type: none"> <li>Level of understanding of the audience</li> <li>What do THEY need to know (i.e., why do they need to hear your presentation)</li> </ul> </li> </ul>	15 min
😊	Discussion	<ul style="list-style-type: none"> <li>Share/pair: Pair up with someone NOT in your group and briefly discuss strategy for your presentation</li> <li>Share ideas with the class at large</li> </ul>	25 min
😊	Discussion	<ul style="list-style-type: none"> <li>Question and Answer</li> </ul>	20 min



# QUICK REFLECTION AND INSTRUCTOR EVALUATION (DAY 8)

---

**INSTRUCTORS/SPEAKERS:**

Course Coordinators

**SESSION LENGTH:**

30 min

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

- Discuss issues/concerns regarding the AWP Workbook
- Clarify what is required on Thursday for the presentations

**TRAINING AIDS:**

N/A

**HANDOUTS:**

- Parking Lot Pads (Pads)
- Instructor Evaluations (Booklets)





**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.



	METHOD	CONTENT	TIME
	Activity	<p>Christy McCormick</p> <p><b>Quick Reflection</b></p> <p>The students already have their Parking Lot pad— Give them time to jot down other thoughts.</p> <ul style="list-style-type: none"> <li>Collect papers. Explain that the instructors and course coordinators will review them and provide a chance for discussion the following morning.</li> </ul>	5 min
	Discussion	<p><b>Group Discussion</b></p> <ul style="list-style-type: none"> <li>Ask for responses.</li> <li>Clarify the unclear; write key answers on flipchart to refer to throughout the course.</li> <li>Give students the opportunity to ask questions regarding the AWP.</li> <li>Explain the Dress Rehearsal to students and mentors.</li> </ul>	5 min
 	Presentation Discussion	<p><b>Review Course Objectives and What to Expect</b></p> <ul style="list-style-type: none"> <li>Tonight <ul style="list-style-type: none"> <li>AWP time</li> <li>Dress rehearsal for presentations</li> </ul> </li> <li>Photos <ul style="list-style-type: none"> <li>Photos are at 7:30 am at the park</li> <li>Please do not be late!</li> <li>Shirts, ties, and jackets</li> <li>Any announcements about dinner on Thursday</li> </ul> </li> </ul>	4 min





# SEOT PRESENTATION DRY RUN

**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 (already provided)

**HANDOUTS:**


- Oral Presentation rubric (Student Manual Appendix)

**FACILITATOR NOTES:**

- Provides 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.

	METHOD	CONTENT	TIME
	Presentation	<p><i>Students and Mentors</i></p> <p><b>Presentation Dry Run</b></p> <p>Student groups will rehearse their SEOT Presentations for their mentors.</p> <ul style="list-style-type: none"> <li>• Mentors will be provided with the grading criteria for the SEOT presentations.</li> <li>• Time should be allowed to provide feedback and work on modifications to the presentation.</li> </ul>	120 min



# SEOT AWP PRESENTATIONS

---

**INSTRUCTORS/SPEAKERS:**

Students

Evaluators: Sandy Pusey, Jenny Dems, Mark Tezel,  
Steve Wolter, Christy McCormick

Filming: Nona Henderson

**SESSION LENGTH:**

5 hours - 2 hours before lunch, 3 hours after lunch

**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:**

- iPad and tripod
- Masking tape

**HANDOUTS:**

- Presentation Rubrics

**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.
- Prior to presentations, the room area needs to be taped off as boundaries for the students

Each student group will have 35 minutes to present and 15 minutes to answer questions from the mentors, instructors, and other 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

9:00–9:35 am – Student Presentation  
9:35–9:50 am – Question and Answer Period  
9:50–10:00 am – Break and Prep for Next Group

Group #2

10:00–10:35 am – Student Presentation  
10:35–10:50 am – Question and Answer Period  
10:50–11:00 am – Break and Prep for Next Group

Group #3

11:00–11:35 am – Student Presentation  
11:35–11:50 am – Question and Answer Period

LUNCH BREAK HERE (11:50 AM–1:00 PM)

Group #4

1:00–1:35 pm – Student Presentation  
1:35–1:50 pm – Question and Answer Period  
1:50–2:00 pm – Break and Prep for Next Group






Group #5

2:00–2:35 pm – Student Presentation  
2:35–2:50 pm – Question and Answer Period

**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.



	METHOD	CONTENT	TIME
	Presentation	<i>Group #1</i> <ul style="list-style-type: none"> <li>• <b>Student Presentation</b> (35 min.)</li> <li>• <b>Question and Answer/Consequence Analysis</b> (15 min.)</li> <li>• <b>Break</b> (10 min.)</li> </ul>	60 min
	Presentation	<i>Group #2</i> <ul style="list-style-type: none"> <li>• <b>Student Presentation</b> (35 min.)</li> <li>• <b>Question and Answer/Consequence Analysis</b> (15 min.)</li> <li>• <b>Break</b> (10 min.)</li> </ul>	60 min
	Presentation	<i>Group #3</i> <ul style="list-style-type: none"> <li>• <b>Student Presentation</b> (35 min.)</li> <li>• <b>Question and Answer/Consequence Analysis</b> (15 min.)</li> </ul>	50 min
		<b>LUNCH</b>	70 min
	Presentation	<i>Group #4</i> <ul style="list-style-type: none"> <li>• <b>Student Presentation</b> (35 min.)</li> <li>• <b>Question and Answer/Consequence Analysis</b> (15 min.)</li> <li>• <b>Break</b> (10 min.)</li> </ul>	60 min
	Presentation	<i>Group #5</i> <ul style="list-style-type: none"> <li>• <b>Student Presentation</b> (35 min.)</li> <li>• <b>Question and Answer/Consequence Analysis</b> (15 min.)</li> </ul>	50 min



# COURSE CONCLUSION

---

**INSTRUCTORS/SPEAKERS:**

Course Coordinators

**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:**

- N/A

**HANDOUTS:**

- Course Evaluations (Booklet)
- Instructor Evaluations (Booklet)
- CEUs



**FACILITATOR NOTES:**

- Should allow students to provide anonymous written 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.

**POINTS TO REMEMBER:**

- N/A



	METHOD	CONTENT	TIME
	Debrief Evaluation	<p><i>Course Coordinators</i></p> <p><b>Provide Course Summary and Evaluation</b></p> <p>Course Conclusion/Course Evaluation</p> <ul style="list-style-type: none"> <li>• Thank students for participation.</li> <li>• Hand out course evaluations and mentor workshop evaluations.</li> </ul> <p>Allow the students and mentors 15 minutes to complete course and instructor evaluations and turn them in.</p>	10 min
	Discussion	<p><b>Lead Discussion and Question/Answer Period</b></p> <p>Solicit further questions, observations, issues from group.</p> <ul style="list-style-type: none"> <li>• Ask for feedback and any questions from the group.</li> <li>• Ask for positive impacts and write up suggestions.</li> <li>• Hand out CEU certificates.</li> </ul>	20 min



# CLOSING DINNER

---

**INSTRUCTORS/SPEAKERS:**

Course Coordinators

**SESSION LENGTH:**

30 minutes

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

- Identify what skills they developed during AFMP
- Describe how those skills can impact parks and even the entire NPS
- State what parks they are visiting for the DLS #2 Field Experience

**TRAINING AIDS:**

- "I Survived Sea Otter Island" T-shirts
- Stuffed sea otters (x4)



**FACILITATOR NOTES:**

- The goal of this session is to intellectually and psychologically wrap-up AFMP.

**POINTS TO REMEMBER:**


- Make sure to focus on how, although challenging, everything that you went through during AFMP was for a reason.



	METHOD	CONTENT	TIME
	Presentation	<b>Introduction and SEOT Super Simulators</b> <ul style="list-style-type: none"> <li>Former students have called AFMP boot camp – BUT, although it is stressful, the extra pressure you felt these past two weeks is actually similar to the pressure you'll deal with in real life as an FM.</li> <li>If you think things are going to calm down once you finish FMLP and get a promotion, think again. <ul style="list-style-type: none"> <li>(Ask for mentors to confirm this)</li> </ul> </li> <li>Luckily, you weren't alone. Besides each other, you had the support of your mentors. Let's take a moment to thank them.</li> <li>Every year, the group who receives the highest score for their AWP earns the right to be crowned SEOT Super Simulators. This year, the team with the highest score was _____.</li> </ul>	5 min
	Presentation	<b>Simulated Park – Real-World Skills</b> <ul style="list-style-type: none"> <li>I've been impressed by what I've seen over the past few days</li> <li>The skills that you've been developing are exactly what are needed in the next generation of facility managers</li> <li>Your ability to communicate to park personnel and to consider all of the inter-working (and interdependent) pieces of the park as a whole will lead to buy-in for the AMP at the park level, and eventually Servicewide.</li> </ul>	5 min





	METHOD	CONTENT	TIME
	Presentation	<b>Academic Rigor of Simulations</b> <ul style="list-style-type: none"><li>• Although the simulation is fun for instructors because of the play-acting and the way it takes us out of the traditional classroom role, it has a serious purpose. This method allows for maximum transfer of knowledge from a training environment to the real world</li><li>• What you learned this week you'll need both in the immediate future and throughout your career:<ul style="list-style-type: none"><li>○ Negotiating differing priorities</li><li>○ Deciphering data and drawing conclusions from it</li><li>○ Synthesizing disparate information into a complete picture</li><li>○ Communicating with and to park staff</li><li>○ Problem solving</li></ul></li><li>• The SEOT Simulation prepared you for your next step – your Guided Field Experience, where you will be helping a real park create their Annual Work Plan.</li><li>• Announce where the teams will be going.</li></ul>	5 min

