

Institute for Facilities Management
APPA 2015 PD Committee Report

Upcoming Programs

The Institute will be held as part of APPA U inn Scottsdale, Arizona September 13-17. As of late July, registration was just shy of 200, on pace for the target of 300 attendees. The next offering of the Institute will be in New Orleans, January 17-21.

Institute for Facilities Management Program Evaluation

Over the past several months, APPA has been conducting a review of the IFM. The final report was published in April of 2015. The Institute leadership and APPA staff considered each recommendation and have provided a response, compiled by Don Guckert, Institute program representative to the PD Committee:

**Institute for Facilities Management Program Evaluation Review
The Institute's Leadership Response
July 27, 2015**

In the fall of 2013, the Institute leadership and Chuck Scott, Vice President for Professional Development, commissioned a comprehensive review of the Institute for Facilities Management (IFM). The deans assessed the critical issues and developed a scope for the review, dated April 17, 2014, with the intent to determine the relevancy of the educational content the value gained by attendees for the money invested, an assessment of the effectiveness of communicating and marketing APPA U to the membership, the quality and performance of faculty, the positioning of the Institute for the future, and the effectiveness of volunteer leaders and APPA staff in the management of the program.

A review team composition, structure and process were outlined, and seven team members were recruited for the review. The review team was formed in May of 2014. Led by Steve Kraal, members of the review team represented each of the six APPA regions: Jack Hug, Kristie Kowell, Andy Maddox, Chris Smeds, Lisa Potter and Tim Garland. The team was charged with evaluating the educational content and the value gained by attendees; assessing the effectiveness of communication; the perceived

performance of faculty; the positioning of the IFM for the future; and the effectiveness of the volunteer leaders and APPA staff in the overall management of the program. In addition, the review team was encouraged to explore areas outside the scope of the review, should their investigation lead them into those areas.

The review team kicked off their efforts in July 2014, and conducted on-site surveys of members at APPA 2014 in San Diego. The team also surveyed members in the summer of 2014 and conducted on-site interviews, polling and operational assessments at the Orlando Institute in September 2014. A final report dated March 23, 2015 provided the review team's observations and recommendations for the deans¹, APPA Leadership and the VP of Professional Development to consider and address.

In late May 2015, the deans met at a retreat in Lexington, Kentucky with Lander Medlin and Suzanne Healy, who are referred to in this report as "APPA leadership." Collectively, the deans and APPA leadership are referred to here as "Institute leadership." The Institute leadership addressed each of the specific recommendations in the review team's report. The Institute leadership response follows the general outline of the review team's report.

Executive Summary

The Institute leadership is pleased with the following overall evaluation by the review team:

"...the Institute for Facilities Management (IFM) is currently working well and that a significant majority of the attendees feel that:

- *The content offered meets their needs.*
- *They are satisfied with the value received for the cost.*
- *Faculty quality and performance are both viewed as strengths.*
- *The APPA and volunteer staff provide a high quality product."*

This general positive assessment provides a solid foundation from which to address the specific recommendations contained in the report. We also concur with the recommendation that *"... the on-site delivery of content, which facilitates networking between attendees and faculty, be continued."*

¹ The four Institute deans (Jay Klingel, Mary Vosevich, Lynne Finn and Don Guckert) are referred to collectively as "the deans."

The Institute leadership discussed the Institute's mission and is in alignment with the review team's position that *"the basic premise for the IFM that is to provide an understanding of facility management in the context of educational institutions."* The Institute leadership believes that the IFM provides a highly valuable blend of relevant training from both classroom instruction and peer-to-peer networking. The networking aspect of the Institute experience affords an opportunity to develop a professional network that will serve attendees well into their careers.

The following is the Institute leadership's point-by-point response to the remaining 18 recommendations contained in the review team's report.

Strategic Planning – Marketing

Recommendation #1: *Develop a well-articulated Customer Value Proposition - Responsible party: Deans, supported by a working group*

Response: The team agrees with the recommendation to develop a clear Customer Value Proposition. The APPA leadership launched this effort at its May 2015 retreat. While much more effort will need to be invested to develop the value propositions, some of the early concepts and central themes for a CVP statement included:

- Preparation for career growth
- Elevated performance through a broader understanding of the facilities management portfolio
- Preparation for professional certification
- Developing a sense of professionalism
- Developing a professional network from which to draw from and to which to contribute
- Providing value-added contributions to the institution (i.e. institutional return on training investment)
- Elevating individual job satisfaction and morale
- Bringing best practices to their organizations and institutions

Over the next year, Institute leadership will endeavor to summarize these and other value positions into a more concise statement for use in Institute marketing, promotion, branding and messaging.

Recommendation #2: *Establish data-driven key performance indicators - Responsible party: Deans, supported by a working group*

Response: See next response.

Recommendation #3: *As part of an overall assessment of data infrastructure (discussed throughout this report), identify, build, maintain and analyze the datasets necessary for strategic decision-making. This data should be tightly integrated with other IFM and APPA data.*

Response: Much of the APPA leadership's discussion and analysis centered on information management and data analysis. APPA is in the process of evaluating a comprehensive association information management system. The timing is good for the deans to develop a set of dashboards, metrics, data capture and performance indicators that would provide value and add effectiveness in managing Institute operations and curriculum. The deans will identify an individual to lead and coordinate the team's efforts in outlining these specifications and representing the deans' desires for more robust data to inform decision-making. APPA Leadership has shared that the Deans will need to ensure that their desired data points be formalized by the late fall thus allowing for early integration with the establishment of APPA's new AMS.

Recommendation #4: *Identify how large the IFM should be, what is an optimal capacity based on faculty, classroom space and impact on networking opportunities. - Responsible party: VP of Professional Development, Deans and APPA Staff*

Response: The Institute leadership addressed the recommendation related to the size of the Institute. The consensus is that the ideal size of the classroom for any given core or elective course is 50 to 60 individuals; with a preferred range from no less than 40 to no greater than 70 (provided the room size and configuration can accommodate up to 70). Having more than 60 individuals in a classroom begins to negatively affect the networking and class participation that is vital to the brand. Less than 40 may cause a lack of diversity that also has a negative impact on peer-to-peer learning. Also, based on the volunteer-base of faculty, the Institute should continue to be offered only twice a year and with dual tracks. The growth potential is to reach a nominal 500 attendees (60+ per track over eight tracks) per Institute, or 1,000 attendees per year. Recently attendance has been in the range of 600 to 650 per year.

Strategic Planning – Integration

Recommendation #5: *APPA should develop a thoughtful and deliberate process for integrating the APPA “cylinders of excellence.” - Responsible party: VP for Professional Development*

Response: The Institute leadership concurs with the recommendation that “many of the APPA programs, ‘cylinders of excellence,’ could leverage the long term viability of the

IFM and that there could be much better alignment between the IFM and other APPA programs to the benefit of both.” The following changes will be implemented over the upcoming year.

- Leadership Academy - the co-location of the Institute and Academy will continue to offer the opportunity to cross promote both offerings.
- Credentialing - The Institute will accommodate a credentialing prep elective effective September 2015.
- Body of Knowledge (BOK) – The deans will implement a periodic review of BOK content and Institute curriculum for alignment, beginning with Planning, Design & Construction at the September 2015 Institute.
- Thought Leaders – the Institute will offer an elective on the Thought Leaders Report on a trial basis, beginning with the January 2016 Institute. Continuation of the offering will depend on registration interest.
- Other APPA Programs – these will be covered in the APPA 101 elective and through general announcements at APPA U meal gatherings.

Strategic Planning – Succession and Redundancy

Recommendation #6: *Evaluate the overall organizational capacity of the current IFM management structure...*

Response: The Institute leadership discussed organizational capacity. This discussion included the pros and cons of adding an additional volunteer role to oversee operational coordination, dean coordination, attendee networking, and other non-curricula activities. Also discussed was APPA staff abilities to keep pace with increasing demands. The Institute leadership concluded that the current make-up of volunteer deans and APPA staff provides sufficient organizational capacity; provided, however, that they take advantage of opportunities to expend the collective time and effort more efficiently. There are opportunities through better coordination of the dean’s efforts to relieve burdens on APPA staff. And there are opportunities through technology and information systems provided by APPA staff to support more efficient and effective tools for the deans. Therefore, at this time the focus on increasing organizational capacity should be on procedures, standardization, and information systems, instead of addressing any emerging challenges and opportunities with additional staff and/or volunteer members.

Recommendation #7: *Establish a formal process for developing succession management and redundancy in all content areas - Responsible party: Deans*

Response: The Institute leadership developed a strategy for succession management of deans that will be trialed, beginning immediately, with the Operations and Maintenance

track. Strategies for core faculty succession management and core course faculty back-up are being implemented on a trial basis for the energy and Utilities and Planning, Design & Construction tracks.

Recommendation #8: *Provide additional support to the Deans for the academic operation of the IFM - Responsible party: Deans, VP for Professional Development, APPA Staff*

Response: The deans concluded that the “additional support” should come first in the form of information and procedures, which will be the focus of the efforts of Institute leadership over the upcoming year.

Recommendation #9: *Clarify the roles of APPA support staff and volunteer staff - Responsible party: Deans and APPA leadership*

The deans and APPA leadership believe there to be generally good clarity; and where there is ambiguity or lack of clarity, the Institute leadership will work on developing clarity through standard processes and information systems.

Recommendation #10: *Increase operational support for APPA staff - Responsible party: APPA leadership*

Response: APPA’s leadership believes that the current staff provides sufficient support for the Institute and that other APPA staff members are cross-trained to cover regular Institute staff. The deans believe that it is the responsibility of the deans to identify areas that would require additional effort and support. Beginning in September 2015, and as an example of a implanting a more formal process, the Institute chair will compile a request of recommendations for additional support for future institutes. Over time, the APPA leadership will determine whether additional resourcing will be needed to meet potential growing demands.

Recommendation #11: *Develop a financial model for the IFM and Leadership Academy that can support these recommendations - Responsible party: APPA leadership*

Response: The APPA leadership is on track to procure a new information system and will request any additional funding, or build such funding into the Institute budget, to address any resourcing needed to create additional organizational capacity through effective and efficient processes, procedures and information support systems.

Curriculum Review

Recommendation #12: *The review team recommends a regular and knowledgeable review of the method of delivering content, a review of content alignment both horizontally as well as vertically, and the process for class evaluations. - Responsible party: Deans and potentially outside experts*

Response: The Institute leadership will follow a more structured schedule of conducting a comprehensive review every three years on content delivery, content alignment and evaluations. Additionally, through the implementation of a shared and collaborative scheduling system, alignment of content will be built into an ongoing process. The Institute budget will also include resourcing for individual tracks to pursue crisper content, alignment on a regular rotating cycle, as currently piloted by the Energy and Utilities track. The Institute leadership will work with APPA Staff for such scheduling so that funding is not allocated incorrectly.

Recommendation #13: *Class evaluations should provide more focus on participant learning-outcomes - Responsible party: Deans and potentially outside experts*

Response: The class evaluation will be revised and implemented as early as September 2015 and not later than January 2016. The evaluations will also be centrally compiled by APPA staff, which will eliminate the variability among deans on how the information is compiled and when it is distributed to faculty. New information systems will be developed to facilitate a central historical database on faculty performance that can be accessed by all deans.

Recommendation #14: *Determine to what extent course content should align with the Body of Knowledge (BOK) or conversely the BOK with IFM content - Responsible party: Deans and BOK committee*

Response: The Institute course catalog is extensive and much larger than the Body of Knowledge in terms of subject matter. Beginning with the Scottsdale Institute (September 2015), the deans will review the content of the Planning, Design and Construction section of the BOK to determine whether a certain subject matter should be offered, in some form or another, in the core or elective offerings. Other sections will be addressed at subsequent Institute meetings. APPA leadership will be encouraged

to coordinate the reverse process (i.e. scanning the Institute for BOK subject matter) with BOK content editors.

Management Processes

Recommendation #15: *The review team believes that this (i.e. Management Process) is the area of highest risk for the IFM and recommends that APPA create a system that will allow for regular, “data driven” decision-making. This should be used to help ensure alignment with APPA’s overall mission and financial picture and it is recommended that additional focus and resources are provided in several critical areas. Aspects to consider include: what data is important from a holistic viewpoint (e.g. marketing, attendee, financial data), how that data relates together and how that data relates to other APPA datasets; what systems are necessary to store and process the data; what tools are necessary for staff to be able to quickly and easily interact with and analyze the data to make informed business decisions. - Responsible party: APPA leadership and support staff*

Response: The Institute leadership concurs with this recommendation, but believes the deans have a role in working with APPA leadership and support staff to identify the information, analysis and reports that would provide useful tools for the areas identified. The deans will play an active role providing recommendations for what such systems may encompass and will designate a liaison to coordinate efforts between the deans and APPA leadership.

Recommendation #16: *The review team recommends that there be a stronger link between the deans and the IFM financial information. - Responsible party: Deans, VP Professional Development, APPA leadership*

Response: The Institute leadership concurs with this recommendation and deans will collaborate with APPA leadership to develop the appropriate financial reports. Review of these reports will become a standard agenda item for the deans meeting held at each Institute.

Recommendation #17: *The committee also recommends that the deans consider expanding their ranks (or adding this responsibility to the APPA staff) a “networking and*

marketing” dean. This is based on the very significant value that attendees attribute to the networking that occurs and they would like to see expanded at the IFM.

Response: As addressed earlier, the deans considered, then ruled out, the creation of an additional position. Instead, the deans will work on identifying appropriate and tailored networking opportunities and the APPA staff will manage the scheduling and coordination of networking activities. A funding allotment will be placed in the budget preparations and the creation of activities by the deans must fall within this funding allotment.

Recommendation #18: *The review team recommends a comprehensive review of the APPA website and APPA and the IFM’s use of social media. This review should focus on ease-of-use, information architecture and relevance of content. This review should go hand-in-hand with APPA’s considerations of marketing the IFM as websites and social media play critical roles in that activity.*

Response: The Institute leadership concurs with this recommendation. A first order of business will be a critical review of the website and the web-based registration process. Additionally, the APPA Facebook page will be reviewed to assess the benefit of including Institute information.

Closing Remarks

The Institute leadership appreciates the dedication of the review team members in the conduct of a comprehensive and critical assessment of the Institute. The data collected and shared within the report will provide ongoing fodder for discussion, analysis, value proposition development, and future assessments. The review team’s hard work and unselfish commitment to this effort has, in turn, motivated the Institute leadership team to rise to the challenge of following through with the implementation of the many recommendations and good ideas generated by this review. Finally, we look forward to the continued support of APPA’s elected leadership and the Professional Development Committee as we continue to build upon the valued brand of APPA’s Institute for Facilities Management.