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
Vicki Garrett
Sandy Pusey
Mike Seibert
Joy Springer
Mark Tezel
Bob Wilbur

Eppley Institute, Indiana University
Christy McCormick
Katy Patrick
Matthew Rhule
Elizabeth Sherrill
Kate Wiltz
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Dana Anderson
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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 21st century requires insights, choices, and actions within a very competitive environment. Facility management in the Federal sector enjoys a much higher profile than ever before. In-depth studies conducted by the National Academy of Science’s Federal Facilities Council Report state:

"...facilities managers can no longer be regarded only as caretakers who bring unwelcome news about deteriorating facilities and the need for investments. As facilities management has evolved from tactical, building-oriented activities to a strategic, portfolio-based approach, the skills required by facilities management organizations have similarly evolved. ... [This evolution] requires not only the technical skills (e.g., engineering, architecture, mechanical, electrical, contracting) found in traditional facilities engineering organizations but also business acumen and communication skills."

Both the Department of the Interior (DOI) and the NPS have targeted the facility management profession as "mission-critical" because of the importance of maintaining the built environment and the high numbers of facility managers eligible to retire in the near future. In anticipation of the growing need for competent, able facility managers, the NPS has developed a comprehensive set of facility manager competencies to form a roadmap for development of our facility management workforce. Additionally, the
Facility Manager Leaders Program (FMLP), of which the Advanced Facility Management Practices course is the third out of five separate courses, aims to build a core group of competent, up-and-coming facility managers to serve as leaders of facility management in the NPS in the years to come.

Course Goals
Following completion of this course, students will be able to do the following:
- Plan operations, maintenance, repair, and alterations functions.
- 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:
Course Assignments

<table>
<thead>
<tr>
<th>Assignment Name</th>
<th>Points</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Course Assignment (AWP Individual Analysis)</td>
<td>50</td>
<td>Monday, October 17th at 8 a.m.</td>
</tr>
<tr>
<td>Individual Oral Presentation</td>
<td>100</td>
<td>Sunday, October 9th (loaded to Virtual Classroom site)</td>
</tr>
<tr>
<td>Midterm Exam Excel Portion</td>
<td>225</td>
<td>Friday, October 21st</td>
</tr>
<tr>
<td>Excel Homework</td>
<td>50</td>
<td>Wednesday, October 19th</td>
</tr>
<tr>
<td>AWP Critical Analysis (Group)</td>
<td>50</td>
<td>Thursday, October 20th</td>
</tr>
<tr>
<td>Annual Work Plan Blueprint</td>
<td>100</td>
<td>Thursday, October 20th</td>
</tr>
<tr>
<td>DAAV Field Experience</td>
<td>50</td>
<td>Monday, October 24th</td>
</tr>
<tr>
<td>API Facilitation</td>
<td>50</td>
<td>Tuesday, October 25th</td>
</tr>
<tr>
<td>Annual Work Plan Workbook</td>
<td>250</td>
<td>Wednesday, October 26th</td>
</tr>
<tr>
<td>Team Oral Presentation</td>
<td>250</td>
<td>Thursday, October 27th</td>
</tr>
<tr>
<td>Class Participation</td>
<td>100</td>
<td>Thursday, October 27th</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1305</strong></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>90 - 100%</td>
</tr>
<tr>
<td>B</td>
<td>80 - 90%</td>
</tr>
<tr>
<td>C</td>
<td>70 - 80%</td>
</tr>
<tr>
<td>D</td>
<td>60 - 70%</td>
</tr>
<tr>
<td>F</td>
<td>&lt;60%</td>
</tr>
</tbody>
</table>
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).
Student Rights and Responsibilities
Welcome to training! The Park Facility Management Division Asset Management
Training Program wants this course, and all courses, to be an enriching experience for
you, your fellow students, and the instructors. To that end we have developed the
following Student Rights and Responsibilities to help enhance the learning environment.

As a student you have the right to ...
- Have access to instructors, technology, training space, presentations, and other
  resources necessary for the learning process.
- Learn in an environment that supports open dialogue between all students,
  instructors, and other participants.
- Have the freedom to raise relevant issues pertaining to classroom discussion.
- Expect that your work will be evaluated by academic standards alone.
- Clear and honest feedback about assignments and performance.
- A safe learning environment, both physically and intellectually.

As a student you have the responsibility to ...
- Facilitate the learning environment and the process of learning, including
  attending all class sessions, completing class assignments, and coming to class
  prepared.
- Refrain from using cell phones, email, and other devices or programs that
  distract your attention from the learning environment, or intrude on the learning
  of others.
- Prepare for all class sessions appropriately, including studying, completing pre-
  course assignments, reading, and completion of homework.
- Dress appropriately for the class you are attending.
- Treat all individuals, including instructors and other students, in the learning
  environment with a high level of respect.
- Not become an obstruction to your learning, or the learning of others.

Just as the training team would want to be notified that we are not meeting the
standards set forth here, we will also warn students not living up to their responsibilities.
Repeat offenders of the student responsibilities will be asked to leave the course.

Academic Integrity
All students in this course shall abide by the IU Bloomington Faculty Council’s
statement on academic honesty, which asserts the following: “Dishonesty of any
kind with respect to examinations, module assignments, alteration of records, or
illegal possession of examinations shall be considered cheating. Offering the
work of someone else as one’s own is plagiarism.” Students should remember
that any work borrowed from another author must be fully acknowledged and
cited. In addition, resubmitting papers or projects used in other modules, or a
project used by previous students in this class, is prohibited. Anyone found
cheating or violating these policies is subject to serious academic penalty.
# AFMP COURSE AGENDA

## Week 1
**Monday, October 17, 2016**
**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am – 9:15 am</td>
<td>Course Introduction and Welcome to the Park</td>
<td>Dayton Aviation Heritage</td>
</tr>
<tr>
<td>9:15 am – 10:00 am</td>
<td>Welcome to SEOT</td>
<td>Wolter/Tezel</td>
</tr>
<tr>
<td>10:15 am – 12:00 pm</td>
<td>Student Presentations (1 group of 8, 1 group of 9)</td>
<td>Students</td>
</tr>
<tr>
<td>12:00 pm – 1:00 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:00 pm – 1:45 pm</td>
<td>Student Presentations</td>
<td>Students</td>
</tr>
<tr>
<td>2:00 pm – 4:30 pm</td>
<td>Leadership</td>
<td>Wolter</td>
</tr>
<tr>
<td>4:30 pm – 5:00 pm</td>
<td>Quick Reflection &amp; Instructor Evaluation</td>
<td>Course Coordinators</td>
</tr>
</tbody>
</table>

## Tuesday, October 18, 2016
**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am – 8:30 am</td>
<td>Good of the Day and Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td></td>
<td>Individual AWP Analysis Review</td>
<td></td>
</tr>
<tr>
<td>8:30 am – 10:00 am</td>
<td>Intro to Work Types and the Work Order Rodeo</td>
<td>Garrett/Springer</td>
</tr>
<tr>
<td>10:00 am – 10:15 am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:15 am – 12:00 pm</td>
<td>Data-Driven Decision Making (Part 1)</td>
<td>Tezel</td>
</tr>
<tr>
<td>12:00 pm – 1:30 pm</td>
<td>Lunch and Group Work</td>
<td>Students</td>
</tr>
<tr>
<td>1:30 pm – 2:30 pm</td>
<td>Data-Driven Decision Making (Part 2)</td>
<td>Pusey</td>
</tr>
<tr>
<td>2:30 pm – 5:00 pm</td>
<td>Strengths Based Leadership and Working in a Team</td>
<td>Wolter</td>
</tr>
<tr>
<td>Time</td>
<td>Session Title</td>
<td>Guest Speakers</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>5:00 pm – 5:15 pm</td>
<td>Quick Reflection &amp; Instructor Evaluation</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>Evening</td>
<td>(Help Desk is available)</td>
<td></td>
</tr>
<tr>
<td><strong>Wednesday, October 19, 2016</strong></td>
<td><strong>Visitor Center, Dayton Aviation Heritage</strong></td>
<td></td>
</tr>
<tr>
<td>8:00 am – 8:30 am</td>
<td>Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td></td>
<td>Squad Meeting</td>
<td></td>
</tr>
<tr>
<td>8:30 am – 10:00 am</td>
<td>Informal Visitor Contacts: Supporting Your Employees</td>
<td>Tezel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Qualls</td>
</tr>
<tr>
<td>10:00 am – 10:15 am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:15 am – 11:30 am</td>
<td>Asset Management Planning</td>
<td>Mather/Jarvis</td>
</tr>
<tr>
<td>11:30 am – 1:00 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:00 pm – 2:00 pm</td>
<td>Capital Investment Strategy</td>
<td>Tezel</td>
</tr>
<tr>
<td>2:15 pm – 4:00 pm</td>
<td>Project Planning</td>
<td>McCormick</td>
</tr>
<tr>
<td>4:00 pm-4:30 pm</td>
<td>Condition Assessments</td>
<td>Springer</td>
</tr>
<tr>
<td>4:30 pm – 4:45 pm</td>
<td>Quick Reflection, Instructor Evaluation, and Homework</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>Evening</td>
<td>(Help Desk is available)</td>
<td></td>
</tr>
<tr>
<td><strong>Thursday, October 20, 2016</strong></td>
<td><strong>Visitor Center, Dayton Aviation Heritage</strong></td>
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<tr>
<td>8:00 am – 8:30 am</td>
<td>Squad Meeting</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:30 am – 9:30 am</td>
<td>AWP Group Analysis &amp; Consensus</td>
<td>Students</td>
</tr>
<tr>
<td>9:45 am – 11:45 am</td>
<td>Facility Project Development and Fund Sources</td>
<td>Garrett/ Springer</td>
</tr>
<tr>
<td>11:45 am – 1:00 pm</td>
<td>Lunch</td>
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<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
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</thead>
<tbody>
<tr>
<td>1:00 pm – 4:00 pm</td>
<td>Budgeting</td>
<td>Pusey/Springer</td>
</tr>
<tr>
<td>4:00 pm – 5:00 pm</td>
<td>Student Work Time &amp; Filming</td>
<td></td>
</tr>
<tr>
<td>5:00 pm - 5:30 pm</td>
<td>Quick Reflection &amp; Instructor Evaluation</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>Evening</td>
<td>(Help Desk is available)</td>
<td>Chili Cook-off!</td>
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### Friday, October 21, 2016

**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
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<tbody>
<tr>
<td>8:00 am – 8:30 am</td>
<td>Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td></td>
<td>(Shackleton Dilemma)</td>
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</tr>
<tr>
<td>8:30 am – 10:30 am</td>
<td>Mid-Term Exam Essay</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td></td>
<td>Mid-Term Exam Excel</td>
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</tr>
<tr>
<td>10:30 am – 11:30 am</td>
<td>Well-Being</td>
<td>Pusey/Tezel</td>
</tr>
<tr>
<td>11:30 am – 12:30 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:30 pm – 4:00 pm</td>
<td>Field Experience</td>
<td></td>
</tr>
<tr>
<td>4:00 pm – 4:30 pm</td>
<td>Quick Reflection &amp; Instructor Evaluation</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td></td>
<td>Field Experience Homework</td>
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### Saturday, October 22, 2016

<table>
<thead>
<tr>
<th>Time</th>
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<th>Guest Speakers</th>
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<tbody>
<tr>
<td>8:30 am – 9:30 am</td>
<td>Mandatory Student Team Check-in</td>
<td>SEOT Chiefs</td>
</tr>
<tr>
<td></td>
<td>Homewood Suites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Help Desk is available)</td>
<td></td>
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</table>

### Sunday, October 23, 2016

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 am – 9:30 am</td>
<td>Mandatory Student Team Check-in</td>
<td>SEOT Chiefs</td>
</tr>
<tr>
<td></td>
<td>Homewood Suites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Help Desk is available)</td>
<td></td>
</tr>
<tr>
<td>4:00 pm – 5:00 pm</td>
<td>Mentor Briefing</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td></td>
<td>Homewood Suites</td>
<td></td>
</tr>
<tr>
<td>5:00 pm – 8:00 pm</td>
<td>Mentor-Student Mixer</td>
<td>All</td>
</tr>
<tr>
<td></td>
<td>Homewood Suites</td>
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### Week 2
**Monday, October 24, 2016**
**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
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</thead>
<tbody>
<tr>
<td>7:45 am – 8:30 am</td>
<td>Squad Meeting - Opening of Week 2 &amp; Announcements</td>
<td>Students and Mentors</td>
</tr>
<tr>
<td>8:30 am – 12:30 pm</td>
<td>Writing Workshop</td>
<td>Dr. Dana Anderson</td>
</tr>
<tr>
<td>12:30 pm – 1:30 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:30 pm – 2:30 pm</td>
<td>Accessibility</td>
<td>Monroe-Cook</td>
</tr>
<tr>
<td>2:30 pm – 3:30 pm</td>
<td>How to Facilitate an API</td>
<td>Dem/McCormick</td>
</tr>
<tr>
<td>3:30 pm – 4:30 pm</td>
<td>DLS#2 Planning</td>
<td>McCormick</td>
</tr>
<tr>
<td>3:30 pm-5:30 pm</td>
<td>Mentor Workshop I – Strengths Based Leadership with Wolter</td>
<td>Wolter/Pusey</td>
</tr>
<tr>
<td>4:30 pm – 5:30 pm</td>
<td>AWP Work Time (Help Desk is available)</td>
<td>Tezel</td>
</tr>
<tr>
<td><strong>Evening</strong></td>
<td>(Help Desk is available)</td>
<td>Students</td>
</tr>
<tr>
<td></td>
<td>Filming</td>
<td>Mentors</td>
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**Tuesday, October 25, 2016**
**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am – 8:30 am</td>
<td>Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:30 am – 9:30 am</td>
<td>API Facilitation</td>
<td>Students and Mentors</td>
</tr>
<tr>
<td>9:45 am – 11:45 am</td>
<td>Re-Optimization Workshop</td>
<td>Tezel</td>
</tr>
<tr>
<td>11:45 am – 1:30 pm</td>
<td>Lunch</td>
<td>Wolter/Pusey</td>
</tr>
<tr>
<td>1:30 pm – 5:00 pm</td>
<td>AWP Work Time (Help Desk is available)</td>
<td>Students</td>
</tr>
<tr>
<td></td>
<td>Mentor Field Experience</td>
<td>Alexander</td>
</tr>
</tbody>
</table>
**Advanced Facility Management Practices**

<table>
<thead>
<tr>
<th>Evening</th>
<th>(Help Desk is available)</th>
<th>Students</th>
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</thead>
<tbody>
<tr>
<td>Filming</td>
<td>Mentors</td>
<td></td>
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**Wednesday, October 26, 2016**  
**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
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</thead>
<tbody>
<tr>
<td>8:00 am – 8:15 am</td>
<td>Good of the Day &amp; Announcements</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>8:15 am – 9:15 am</td>
<td>Squad Meeting</td>
<td>Garrett/ Springer/ Wolter</td>
</tr>
<tr>
<td>9:30 am – 11:00 am</td>
<td>PFMD Update</td>
<td>Wilbur</td>
</tr>
<tr>
<td>11:00 am – 1:00 pm</td>
<td>Lunch and Student-Mentor Meetings</td>
<td>Students and Mentors</td>
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<tr>
<td>1:00 pm – 3:00 pm</td>
<td>Presentation Planning</td>
<td>Steve Wolter</td>
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<td>Presentation Planning for Mentors</td>
<td>Course Coordinators</td>
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<td>Presentation Planning for Mentors</td>
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<td>Dress Rehearsal</td>
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<tr>
<td>3:00 pm – 3:30 pm</td>
<td>Quick Reflection &amp; Instructor and</td>
<td>Course Coordinators</td>
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<td>Course Evaluation</td>
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<tr>
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<td>AWP Work Time</td>
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<tr>
<td>Evening</td>
<td>Dress Rehearsal for Presentation</td>
<td>Students/Mentors</td>
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**Thursday, October 27, 2016**  
**Visitor Center, Dayton Aviation Heritage**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Guest Speakers</th>
</tr>
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<tbody>
<tr>
<td>8:00 am – 9:30 am</td>
<td>Individual and Group Photos</td>
<td>Class</td>
</tr>
<tr>
<td>9:30 am – 11:35 pm</td>
<td>Presentations</td>
<td>Students</td>
</tr>
<tr>
<td>11:35 pm – 1:00 pm</td>
<td>Lunch</td>
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<tr>
<td>1:00 pm – 2:20 pm</td>
<td>Presentations</td>
<td>Students</td>
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<tr>
<td>2:30 pm – 4:00 pm</td>
<td>Class Conclusion</td>
<td>Course Coordinators</td>
</tr>
<tr>
<td>6:00 pm – 8:30 pm</td>
<td>Group Dinner and Close of Class</td>
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### Friday, October 30, 2015

<table>
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<tr>
<th>Time</th>
<th>Session Title</th>
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<tbody>
<tr>
<td>7:30 am – 8:30 am</td>
<td>Breakfast with Mentors (Optional)</td>
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<tr>
<td>8:30 am</td>
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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.
WELCOME TO SEA OTTER ISLAND NATIONAL PARK!
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. In preparation for retirement, she is in the process of building a log home in Granby, CO. Her lifelong dream is being fulfilled!

Vicki Garrett
Vicki Garrett has been with the National Park Service for 20 years and is the Roads and Trails Supervisor at Sea Otter Island National Park.

Vicki began her NPS career at Horseshoe Bend National Military Park in Daviston, Alabama in the maintenance division as a Facilities Services Assistant. This small park gave her the opportunity to learn all aspects of the maintenance division and how it operates. She was part of the Facility Management Software System (FMSS) implementation team in the Southeast Region in 2000 which lead her to a regional
office position in 2005. She has worked with all parks in the southeast region while completing condition assessments, performing storm damage assessments and learning the skills that made her qualified for the job at SEOT.

Vicki's experience since joining the SEOT has given her additional skills while improving the park assets for visitors. The roads, trails and grounds require a constant imagination and thought process to keep them open and operating. She is always looking for creative ideas on how to improve the park.

Vicki loves the outdoors and animals. She is currently raising two steers, four chickens, two dogs, five grandkids and one husband.

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, but decided to leave the corporate world 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 Lukanim 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:

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. She is also the proud grandmother (Cha-Cha) to two boys, George and Stuart. She has a million photos of them-just ask!

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 2016 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”. 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 granddaughters Carter and Cameron.

Joy Springer
Joy Springer is the Buildings and Utilities Foreman at Sea Otter Island National Park. Joy has been with the Park Service 7 years. She detailed as the Chief of Facility Management at SEOT in 2014 and has been the B&U Foreman at SEOT for a year. Joy started her career with the Park Service as an intern to the Chief of Facility Management at Independence National Historical Park. After graduation, Joy worked in private industry, returning 7 years later to the Park Service as part of the Northeast Region’s FMSS Network, where she served as Team Lead. She decided to move into
Facility Management at the park level after graduating from the Facility Management Leadership Program in 2015.

As B&U Foreman, Joy supervises 10 employees and is responsible for maintaining the Park’s 58 buildings.

Joy lives with her husband, Brad; a dog, Bock; and a cat, Gizmo. She enjoys living near the water and stand-up paddle boarding. You can often find her in the kitchen baking or cooking or on the deck grilling or smoking; traveling with Brad and Bock, typically to National Park sites and earning a Junior Ranger Badge; or at the local brewery, trying the next crazy beer.

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.
Group 1
Cory Dusin
Steve Geick
Zach Grey
Emily Hart
Brad Lenz
James Sutton
Heidi Van Dunk
Jeff Wilson

Group 2
Jeff Gowen
Eric Herrera
Randy Hill
Lisa Lorang
Kevin Month
Alex Patterson
David Pope
Scott Simmons
Machelle Zia
STUDENT PRESENTATIONS

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.
LEADING FACILITY MANAGEMENT:
CONTINUING THE JOURNEY TO
MASTERING LEADERSHIP

Objectives: At the end of this session, students should be able to:
- 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.
- 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.
PRINCIPLES OF FACILITY MANAGEMENT REVIEW
A Starting Place for the FMLP Journey: Systems, Models, and Understanding Leadership

An Introduction
The Facility Manager Leaders Program (FMLP) is an important succession management and development tool for the discipline of facility management in the National Park Service (NPS). The FMLP is about asset management, lifecycle business practices, and, in the end, about leading people, groups, teams, organizations, and communities—not merely managing them. The purpose of the leadership component in the FMLP is to provide each of the students with an understanding of leadership, how it best “fits” them, how their role as a leader is pervasive, and how they can help develop leadership capabilities in individuals within their organization.

Five learning units make up the FMLP, including two units that have been completed: Principles of Facility Management and Distributed Learning Session 1 (DLS #1). The Advanced Facility Management Practices (AFMP) course makes up the third. Its focus is on leadership development in the context of advanced topics defined by the outline provided in the Principles of Facility Management course and DLS #1. One of the goals of AFMP is mastery of three leadership frameworks required for FMLP students to be exceptional leaders.

Review: Three Transformational Ideas
Rooted in the FMLP are three transformational ideas that each FMLP student (and possibly mentor) should be able to grasp and utilize in their profession.

1. Being the best at whatever we do as an organization requires exceptional leadership throughout the organization.
2. Exceptional leadership is difficult to define, hard to recruit with a high degree of accuracy, and unusually rare.
3. Being a leader starts with a careful mastery of three frameworks: (1) a personal leadership framework, (2) a framework for leading work groups and teams (others), and (3) a framework for leading systems.

Review: Leadership Journey
Often the metaphor of a journey is used to describe the leadership program in FMLP. Within this journey, FMLP students have the opportunity to master various frameworks and focus on competency development in a safe environment. Specifically, the FMLP program focuses on three leadership frameworks that students must master, culminating in an experiential learning event at the end of FMLP.

Review: Leadership Journey I – Personal Framework
During Principles of Asset Management and a substantial part of DLS #1, the FMLP focuses on the leader’s personal worldview, how interactions with followers help to define a leader’s framework, and the components of a personal leadership framework. A simple but dynamic process of three spheres intersecting in order to form some
equilibrium is one way to view and cope with the major issues of understanding a personal leadership framework. Similarly, FMLP gives students the opportunity to explore and build a personal leadership framework that manages the complicated and complex leadership role they are entering; it is intended to serve as a map to guide their journey.

The personal leadership framework is focused on complicated and complex systems that drive each individual's worldview. While many daily issues and challenges can be handled by rote, by doing what we've done in the past, by using methods that cope with complexity and chaos, or simply by marking time, there is a different choice. The issues and challenges of the day can be viewed as opportunities for change and growth, for innovation, for finding ways to bring real change to others, to a unit or organization, and to society. Intentionally (or deliberately) considering the situation, the leadership framework, the influences, and strategic choices to be made, can create a leadership opening. This is the choice that FMLP students are asked to see at this point in the FMLP Leadership Journey.

The leadership framework used in FMLP is Mastering Leadership From The Inside-Out as shown in Figure 4.

Figure 4: Personal Leadership Framework Factors to Master

- Strengths-Personality
- Preferences
- Deliberate
- Leading v. Managing
- Character
- Follower Interactions
TLC Journey Log

- The Journey Started with Self Exploration
  - Exploration of leadership, management and discussion of a leadership model
  - Self-development as leadership development
  - Leadership philosophy
  - Leadership experiences
  - Strategic leadership styles & OD Introduction
- Next Navigation Point on the Journey- Understand Others

Four Components of Leadership

- Leader
- Situation
- Followers
- Environment
Review: Management Tasks

Planning & Budgeting  Long term look with detailed steps for achieving targets
Organizing & Staffing  Create human systems to implement plans/services
Controlling & Problem Solving  Monitoring results of planning and solving problems when deviations occur

Review: Leadership Tasks

Setting A Direction  Developing a vision, strategies for producing change
Aligning People  Communicate the vision to clarify direction and empowering employees
Motivating & Inspiring  Keep people moving in the right direction by appealing to needs, values and emotions
Daft 3.7 - Five Leader Decision Styles

Leader Roles in the Path-Goal Model
Model of Personality: Big Five Personality Dimensions

1. Extraversion
2. Agreeableness
3. Conscientiousness
4. Emotional Stability
5. Openness to Experience

Leader-Follower Relationships Continuum

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 2</th>
<th>Stage 3</th>
<th>Stage 4</th>
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<tbody>
<tr>
<td>Control</td>
<td>Participation</td>
<td>Empowerment</td>
<td>Service</td>
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<tr>
<td>Authoritarian leader</td>
<td>Participative leader</td>
<td>Stewardship leader</td>
<td>Servant leader</td>
</tr>
<tr>
<td>Obedient subordinates</td>
<td>Team players</td>
<td>Self-responsible employees</td>
<td>Whole employees</td>
</tr>
</tbody>
</table>

Control Centered in the Leader

Control Centered in the Follower
Application and Knowledge Check: Personal Leadership Framework
What do you know now?

What do you think you don't know?

What can you apply now, deliberately, to this simulation?
Review: FMLP Leadership Journey II: Leading Groups and Teams
Mastering the ability to lead others, through your strengths and the strengths of others, is critical. FMLP students are given the opportunity to understand who they are, what they are best at, what others are best at, and how to use these strengths to design a living system of individuals with different frameworks, values, characters, and competencies—and thus create an organization that excels.

Learning to lead others requires FMLP students to build on their personal leadership framework by focusing on complicated and complex factors that drive each follower’s worldview. FMLP students will use a Strengths-Based Leadership (SBL) assessment as a first step, along with an understanding of follower needs, work group functions, and teams. This area of learning helps to define what others need/want, what SBL means to you, how interactions with followers drive leadership effectiveness, and how it fits into a leadership framework as an important step in the leadership journey.

Leading others is what is expected of leaders. Yet, history shows that sometimes leaders lose their way, lose followers, and sometimes fail. We must remember: if no one is following us, whom are we leading? Gandhi once said, “There go my people, I am their leader. I must follow them.” Shouldn’t other leaders consider their followers, too?

Learning about followers is similar to learning about ourselves: followers have motives, personalities, strengths, and aspirations. This segment of the Leadership Journey will be about expanding our leadership framework to include others, groups, and teams.

Figure 5: Group/Team Leadership Framework Factors to Master

- Follower Communications
- Follower Diversity
- Motivating Followers
- Group vs Team Functions-Needs
- SBL-Frameworks
## Application and Knowledge Check: Group/Team Leadership Framework

**What do you know now?**

**What do you think you don’t know?**

**What can you apply now, deliberately, to this simulation?**
Review: Individual Behaviors

- Behavior-goal oriented
- Goals-outside reward
- Reward based on individual's needs
- Goal achievement is the result of activities
- Motivators drive behavior

Review: Motivators

- Concentrate on actually doing the job
- Concentrate on the 'environment' of the job

<table>
<thead>
<tr>
<th>Job Content</th>
<th>Job Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement/recognition</td>
<td>Environment</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Policy</td>
</tr>
<tr>
<td>Work Itself</td>
<td>Work conditions</td>
</tr>
<tr>
<td></td>
<td>Supervision</td>
</tr>
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<td></td>
<td>Wages</td>
</tr>
</tbody>
</table>
### Review: Motivator & Hygiene Factors

<table>
<thead>
<tr>
<th>Hygiene Factors Help to Reduce Job Dissatisfaction</th>
<th>Motivation Factors Help to Increase Job Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement</td>
<td></td>
</tr>
<tr>
<td>Recognition for Achievement</td>
<td></td>
</tr>
<tr>
<td>Work Itself</td>
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<tr>
<td>Responsibility</td>
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<tr>
<td>Advancement</td>
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<tr>
<td>Growth</td>
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<tr>
<td>Company Policy &amp; Administration</td>
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<tr>
<td>Supervision</td>
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<tr>
<td>Interpersonal Relations</td>
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<tr>
<td>Working Conditions</td>
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<tr>
<td>Pay</td>
<td></td>
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<tr>
<td>Status</td>
<td></td>
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<tr>
<td>Security</td>
<td></td>
</tr>
</tbody>
</table>

### Team Behavior & Measuring Team Success

- Forming
- Storming
- Norming
- Performing
- Adjourning

**Role**

- Strategy
- Purpose
- Feedback
- Process
- People
- Interfaces
Work Groups vs. Work Teams

- Groups are:
  - Committees
  - Task forces
  - Improvement groups
  - Not all groups are teams
  - Dynamics of groups is important

- Teams are:
  - Informal teams
  - Single function teams
  - Multi-functional teams
  - Self-directed teams
  - Collaborate to reach a goal

Evolution of Teams and Team Leadership

- Functional Team
  - Grouping individuals by activity
  - Leader centered
  - Vertical or command team

- Cross-Functional Team
  - Coordinates across organization boundaries for change projects
  - Leader gives up some power
  - Special purpose team, problem-solving team

- Self-Directed Team
  - Autonomous, defines own boundaries
  - Member-centered
  - Self-managed team

Need for traditional leadership ➔ Need for team leadership
Interdependence

Interdependence
- The extent to which team members depend on each other for information, resources, or ideas to accomplish their tasks

Pooled Interdependence
- The lowest form of team interdependence, members are relatively independent of one another in completing their work

Sequential Interdependence
- Serial form of interdependence in which the output of one team member becomes the input to another team member

Reciprocal Interdependence
- Highest form of interdependence, members influence and affect one another in reciprocal fashion

Leading Effective Teams

Team Effectiveness
- The extent to which a team achieves four performance outcomes:
  - Innovation/adaptation
  - Efficiency
  - Quality
  - Employee satisfaction

Team Cohesiveness
- The extent to which members stick together and remain united in the pursuit of a common goal
  - Interaction
  - Shared mission & goals
  - Competition-collaboration
  - Team success
Team Leadership Roles

Task-Specialist Role
- Team leadership role associated with initiating new ideas, evaluating the team's effectiveness, seeking to clarify tasks and responsibilities, summarizing facts and ideas for others, and stimulating others to action.

Socio-Emotional Role
- Team leadership role associated with facilitating others' participation, smoothing conflicts, showing concern for team members' needs and feelings, serving as a role model, and reminding others of standards for team interaction.

Two Types of Team Leadership Roles

<table>
<thead>
<tr>
<th>Task-Specialist Behavior</th>
<th>Socio-Emotional Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Propose solutions and initiate new ideas</td>
<td>Encourage contributions by others; draw out others' ideas by showing warmth and acceptance</td>
</tr>
<tr>
<td>Evaluate effectiveness of task solutions; offer feedback on others' suggestions</td>
<td>Smooth over conflicts between members, reduce tension and help resolve differences</td>
</tr>
<tr>
<td>Seek information to clarify tasks, responsibilities, and suggestions</td>
<td>Be friendly and supportive of others; show concern for members' needs and feelings</td>
</tr>
<tr>
<td>Summarize ideas and facts related to the problem at hand</td>
<td>Maintain standards of behavior and remind others of agreed-upon norms and standards for interaction</td>
</tr>
<tr>
<td>Energize others and stimulate the team to action</td>
<td>Seek to identify problems with team interactions or dysfunctional member behavior; ask for others' perceptions</td>
</tr>
</tbody>
</table>
A Model of Styles to Handle Conflict

Preview: Leadership Journey III: Mastering Organizational Leadership
Leading oneself is the first task of mastering leadership. Through understanding and intentional, deliberate problem solving, a personal framework and framework for followers can build leadership capacity. Yet FMLP students live and work in organizations with large models, working methods, business practices, and culture—basically large social systems, small organizations, large organizations, etc.—that all have similar components to deal with complexity. These work practices and culture can create inflexible and often difficult contexts in which leaders must work. Yet leaders are often given the unique opportunity to influence and design (i.e., lead) an organization that distinguishes how components can be used to better meet the leader’s and follower’s shared vision. A leader must recognize and utilize the rare moment when leader, follower, and situation align in a way that fosters positive change. This is truly where FMLP students, as leaders, will be able to inspire, motivate, and align.

“Leaders who appreciate organizations as living systems approach design work differently. They realize that they can create organizational artifacts like new symbols, metrics, formal roles and processes, intranet Web sites, or innovative meetings—but it is what happens when people use the artifacts or processes or participate in the meeting that matters.”

—Peter Senge, The Fifth Discipline (p. 321)
Figure 6: Systems Leadership Framework Factors to Master

- Diversity Systems
- Power & Influence Politics
- Information and Data
- Strategic Direction
- Culture and Values
- Leading Change
Evolution of Organizational Diversity
Awareness and Action

Stage 5
Diversity is inherent in the culture
Gender and color-blind

Stage 4
Diversity as "Moral Imperative"
Top-level commitment to valuing diversity

Stage 3
Diversity as a competitive weapon
Effort to recruit/retain minorities

Stage 2
"We need to react"
Recognition of barriers minorities face

Stage 1
Meet legal requirements
Diversity as a "problem"

Stages of Personal Diversity Awareness

Integration
Multicultural attitude – enables one to integrate differences and adapt both cognitively and behaviorally

Adaptation
• Able to empathize with those of other cultures
• Able to shift from one cultural perspective to another

Acceptance
• Accepts behavioral differences and underlying differences in values
• Recognizes validity of other ways of thinking and perceiving the world

Minimizing Differences
• Hides or trivializes cultural differences
• Focuses on similarities among all peoples

Defense
Perceives threat against one's comfortable worldview
Uses negative stereotyping
Assumes own culture superior

Highest Level of Awareness
Five Types of Leader Power

- Legitimate
- Reward
- Coercive

Position Power

- Expert
- Referent

Personal Power

Responses to the Use of Power

Position Power

- Appropriate use
  - Compliance
- Excessive use
  - Resistance

Personal Power

- Commitment
Characteristics That Affect Dependency and Power in Organizations

- Leader has control over:
  - Resources seen as unimportant
  - Widely available resources
  - Resources with acceptable substitutes

- Leader has control over:
  - Resources seen as very important
  - Scarce resources
  - Resources with no substitutes

Low dependency on leader → Lower Power

High dependency on leader → Higher Power

Strategic Contingencies that Affect Leader Power in Organizations

- Interdepartmental Dependency
- Control over Information
- Organizational Centrality
- Coping with Uncertainty

Increased Power
Seven Principles for Asserting Leader Influence

1. Use rational persuasion
2. Make people like you
3. Rely on the rule of reciprocity
4. Develop allies
5. Ask for what you want
6. Remember the principle of scarcity
7. Extend formal authority with expertise and credibility

The Domain of Strategic Leadership

- Vision
- Mission
- Strategy
- Architecture for alignment and implementation
The Nature of the Vision

Strategic Management

**Strategic Management**
- The set of decisions and actions used to formulate and implement specific strategies that will achieve a competitively superior fit between the organization and its environment so as to achieve organization goals

**Strategy**
- The general plan of action that describes resource allocation and other activities for dealing with the environment and helping the organization attain its goals
Making Strategic Decisions

<table>
<thead>
<tr>
<th>Strategic Impact</th>
<th>Ease of Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High</strong></td>
<td><strong>High Impact</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Hard to Implement</strong></td>
</tr>
<tr>
<td></td>
<td>Major changes, but with potential for high payoff</td>
</tr>
<tr>
<td><strong>Low</strong></td>
<td><strong>Low Impact</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Hard to Implement</strong></td>
</tr>
<tr>
<td></td>
<td>Difficult changes with little or no potential for payoff—avoid this category</td>
</tr>
<tr>
<td><strong>High</strong></td>
<td><strong>Easy to Implement</strong></td>
</tr>
<tr>
<td></td>
<td>Simple changes that have high strategic impact—take action here first</td>
</tr>
<tr>
<td><strong>Low</strong></td>
<td><strong>Easy to Implement</strong></td>
</tr>
<tr>
<td></td>
<td>Incremental improvements, &quot;small wins,&quot; pursue for symbolic value of success</td>
</tr>
</tbody>
</table>

**Review:** Systems Leadership and Our Worldview
Leadership is a relatively new field of academic study. The formal study of leadership is generally agreed to have started around the time of the industrial revolution and has created a plethora of theories, studies, papers, and books. Visiting a local bookstore will clearly demonstrate just how many leadership approaches one can choose from! The 21st century is a time of continual change. The interconnected nature of people, the environment, the economy, and other factors is in dynamic equilibrium at most times. Yet the rate of change and the availability of resources for everyone make this era difficult to lead. It leads to profound questions for individuals and organizations about purpose, meaning, and mission, especially for those who are in the public realm where there are many stakeholders.

The end result is a dynamic interaction between these many factors that creates complexity that is best solved through a personal framework, which may best be called a worldview.

**Review:** Our Worldview
As individuals each of us develops a worldview that helps us frame how we see and interact with the dynamic issues we face daily. A worldview may help us determine how we find purpose, how we cope with rapid change, how we see complicated issues like climate change, loss of biodiversity, sequestration, or how others feel about these and other issues. Our worldview helps as a filter and framework to deal with complexity.
Understanding that our worldview is both complex (relatively simple with three or four variables that are unpredictable like human factors and can lead to chaos) and complicated (a problem that can be addressed with a reductionist or highly engineered management system like a car) is germane to leadership in the 21st century. Since our worldview is complex and complicated, prone to messy, immediately unsolvable problems, we build a framework to help manage the complicated and cope with the complex. This framework, which is our worldview, is composed of three main elements, as shown below.

Figure 7: A Leader's World View Framework

The simple framework above depicts how a worldview dynamically influences leaders, their personalities, beliefs, attitudes, and values. These personal factors in turn influence how the individual leads others and organizations. But our worldviews are also constantly changing and affected by factors like our culture, the culture of others, and our experiences. In fact, each leader has choices in what influences are used to filter a worldview as shown below: filters such as follower influence and communication champion approaches such as dialogue and understanding follower motives, as well as the larger organizational leadership practices previewed.

Figure 8: The Effects of a Leader's Open or Examined Culture on World View

Effective leaders generally exhibit a problem-solving, open-culture approach to their worldview that allows them to better anticipate change, itemize component issues, explore relationships, look for patterns of behavior, and identify process, structure, and function using tools like concept maps. It is often this more intentional, deliberate process that sets great leaders apart from good leaders.
The Path Forward: DLS2, DFE, Capstone, and Synthesizing a Systems Approach:
As FMLP continues into Distributed Learning Session 2 (DLS2), the Directed Field Experience (DFE), and Capstone, FMLP students will be lead through a number of learning and experiential events that help to further refine the leadership learning framework as depicted below.

![Leadership Mastery Framework](image)

**Figure 9: FMLP Leadership Mastery Learning Framework: “Inside-Out”**

DLS 2 and Capstone is designed to allow students to learn more about leadership from the Organization Systems perspective by:

- Leading their peers in understanding FM, supervision, compliance, and other issues in NPS facility management via mentor/student webinars.
- Experiencing an ‘in-house consulting’ DFE at a specific park with a team of peers supported by the FMLP training team where FM operations, and park unit leadership approaches are investigated with an eye toward creating a better FM plan for the park.
- Learning how organizational systems framework factors affect the NPS from NPS WASO leaders who head policy offices and direct the NPS from WASO at Capstone.
• Developing their version of an organizational leadership framework that FMLP students believe all NPS FM personnel should utilize.

Worldview of Leaders As A Window to Advanced Leadership Analysis
The worldview of leaders is in reality a filtering, reductionist framework that is synthesized for solving the complex and complicated matters involving values, ethics, followers, and systems. One highly regarded framework is discussed in The Fifth Discipline, a seminal leadership book by Peter Senge. Senge outlines factors used in a systems approach to leading organizations:

1. "Personal mastery is a discipline of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively." (p. 7)

2. "Mental models are deeply ingrained assumptions, generalizations, or even pictures of images that influence how we understand the world and how we take action." (p. 8)

3. "Building shared vision is a practice of unearthing shared pictures of the future that foster genuine commitment and enrollment rather than compliance." (p. 9)

4. "Team learning starts with dialogue, the capacity of members of a team to suspend assumptions and enter into genuine thinking together." (p. 10)

5. Systems thinking is the Fifth Discipline that integrates the other four and includes concepts about the new role of leaders in learning organizations as designers, stewards, and teachers.

This process will start now and continue through the Distributed Learning Session 2 (DLS #2), the Capstone Study in Facility Management course for FMLP graduation, and throughout your career. To create a synthesized, deliberate approach to how one leads followers in a facility management division, park unit, park, or other organization is an ever-changing, highly evolved task.
A Framework for Motion

- Synthesis
- of physics and math

![Diagram of bicycle wheel and chain]

Synthesizing a Leadership Framework

SYNTHESIS in leadership is the deliberate, thoughtful application of leadership theories, principles, and concepts to infer relationships among them in order to develop a cogent leadership framework that fits most anticipated situations.
What is Synthesis?
A synthesis in a written report draws on one or more sources, concepts, themes, principles, and theories to form a cogent and coherent presentation of facts or ideas. The purpose of a synthesized leadership framework is for you to present your own worldview—supported, of course, by relevant facts, drawn from sources, and presented in a cogent, logical manner. The thesis of a leadership synthesis framework is arguable and debatable. It makes a proposition with which reasonable people could disagree, and any two individuals working with the same source materials could conceive of and support other, opposite theses.

It follows that your ability to synthesize a leadership framework depends on your ability to infer relationships among many different leadership concepts, principles, and/or theories as you deliberately apply them to a situation or event involving followers.

The skills that individuals already practice daily and in writing are syntheses. Clearly, FMLP students are in a position to draw relationships between two or more sources, understand what those sources say, and summarize these sources to make decisions or take a position on an issue. However, you must go beyond summary and making judgments on personal opinion or experience. Judgments based on your critical understanding of a situation, as well as the application of concepts, theories, and principles to support a decision, are required!

Because a synthesis is based on two or more sources, FMLP students will need to be selective when choosing information from each. It would be neither possible nor desirable, for instance, to make a leadership decision based on your personal leadership preferences or on one follower’s perspective, or by following the “company” (or NPS) line. That may be effective management, but it is seldom effective leadership.

Remember that effective leadership is likely a much more thoughtful and deliberate practice than we had imagined. As Senge implies, effective leaders “purposely create organizational artifacts like new symbols, metrics, formal roles and processes, intranet Web sites, or innovative meetings” for purpose and effect. What happens in these processes, how the artifact is designed, is where leadership happens.

Experiential Application: Simulation, Field Experience, and Directed Activity

Leadership development is an experiential process; it is in many ways the “school of hard knocks.” Research has shown that the mastery of leadership frameworks is related to continuous learning, measured and deliberate synthesis of information, and experience. In fact, Kouzes and Posner (authors of The Leadership Challenge) suggest that leadership development excels if the following 5 principles are applied:

No. 1: Believe that you can lead.

No. 2: Give yourself the opportunity to lead. Experience, trial and error if you will, is by far the most important opportunity to learn leadership.
No. 3: Seek out guidance from other people who have leadership experience. Ask a leader you admire if you can interview him or her.

No. 4: Seek training and education opportunities to augment leadership development by experience or through other people. While "learning by doing" seems to be the most effective way to learn leadership, education and training can improve your chances for success.

No. 5: View leadership development as self-development.
FMLP engages in these 5 principles and the best practices of leadership development programs that include 1) continuous assessment and feedback; 2) leadership capability analysis; 3) experiences and field activities that allow learners to practice leadership in simulations, field experiences, and other lower-risk situations; and 4) significant involvement of the organization’s leaders and influential stakeholders in the training and development program.

To this end, the FMLP has two activities in DLS #2 that are foundational leadership (as well as facility management) development activities. These are the Directed Field Experience and the 2nd RDA as approved.

Next Leg of the Journey

- Personal best leadership experience is project based and probably related to the PAMP or RDA
- Must represent a significant challenge to you
- Should stretch you, allow you to practice leadership skills, and take risk
Criteria for Personal Best Leadership Project

☐ The project is about changing business as usual
☐ You are the leader or part of a clearly identified leadership team
☐ Has a start and stopping point
☐ A specific objective to accomplish
☐ Involves other people
☐ Project is about to start, or just started

Defining Leadership

Leadership begins where management ends, where the systems of rewards and punishments, control and scrutiny, give way to innovation, individual character, and the courage of convictions. Your challenge is to lead your staff to get extraordinary things done. This requires inspiring and motivating your staff toward a common purpose and building a cohesive and spirited team.

- David and Roger Johnson

Leadership is a reciprocal relationship between those who choose to lead, and those who decide to follow.

- James Kouzes and Barry Posner

Leadership is an influence relationship among leaders and followers who intend real changes and outcomes that reflect their shared purposes.

- Richard Daft
Understanding Your Skills

- Leadership journey -

- What are my skills?
- Leadership Skill Gap
- Preferred Future
LEADING FACILITY MANAGEMENT:
APPLYING MY AFMP JOURNEY TO MASTERING LEADERSHIP FOR SEOT

What concepts, principles, theories do I believe apply most to leading a park unit?

What 2 potential situations might I face in the SEOT simulation, or in the directed field experience, that may present a "leadership moment" or challenge?

Describe your approach to one of these situations that you may use that embodies your preferred leadership frameworks (personal and group/team).
TEAM PRESENTATION TO
MANAGEMENT & SBL HOMEWORK

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:

- Actuals vs. planned work
- Optimizer bands
- APIs
- Reduction of DM
- Critical Systems Work
- Alignment with the PAMP?

The data elements that you discuss should be highlighted on the AWP Spreadsheet.

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.

On Thursday, your SEOT team will be presenting a brief consensus-based analysis of last year’s AWP, building off of your individual analyses. You should be using the PAMP, the existing AWP, and Past Projects. The rubric for the oral presentation is below (beginning on the next page).

**Strengths-based Leadership**

- You need to take the positive impact test—print it out and bring it along with all other documents regarding SBL, including book
- https://strengths.gallup.com/
- BRING YOUR LAPTOPS TOMORROW FOR DATA DRIVEN DECISION MAKING!
## FMLP: AFMP GROUP PRESENTATION

### RUBRIC-AWP CRITICAL ANALYSIS

<table>
<thead>
<tr>
<th>Objective</th>
<th>Excellent</th>
<th>Evaluative Criteria</th>
<th>Needs Work</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thesis</strong> 5 points</td>
<td>• The presentation is clear, focused, and expresses a dynamic thesis</td>
<td>• The speakers are beginning to define the topic and suggest a main point; however, the development is still too basic or general.</td>
<td>• The presentation has no clear sense of purpose or central point.</td>
<td></td>
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<tr>
<td></td>
<td>• The listener’s attention is held throughout.</td>
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</tr>
<tr>
<td><strong>Organization</strong> 10 points</td>
<td>• The speakers present information in logical, interesting sequence.</td>
<td>• The speaker presents information in logical sequence but with some confusing transitions.</td>
<td>• The presentation lacks a logical progression of ideas.</td>
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<tr>
<td></td>
<td>• The opening and closing remarks are engaging and appropriately set the mood for the presentation.</td>
<td>• The speaker delivers adequate opening and closing remarks.</td>
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<td></td>
<td>• The speakers each take an equal division of presenting</td>
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</tr>
<tr>
<td><strong>Support and Evidence</strong> 15 points</td>
<td>• The speakers demonstrate thorough knowledge (more than required) by answering questions with explanations and elaborations.</td>
<td>• The speakers can answer basic questions regarding the topic but fails to elaborate.</td>
<td>• The speakers do not display clear introductory or closing remarks.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Anecdotes and details are employed, are relevant, and enrich the theme.</td>
<td>• Some support for ideas is offered, but it is unclear how evidence and details are specifically linked to claims/ideas.</td>
<td>• The speakers do not use supporting documents to support their claims.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The speakers use various sources (PAMP, Project List, Prior year AWP) to draw from on their analysis</td>
<td>• The speakers draw from some but not all documents</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pacing</strong> 5 points</td>
<td>• Delivery is well patterned and natural, and student meets apportioned time interval.</td>
<td>• The speaker’s pace of delivery is satisfactory but does not meet apportioned time interval, or, presentation fills the apportioned time interval, but the pace of delivery is either too slow or too</td>
<td>• The speakers’ pace of delivery is either too quick or too slow and does not meet apportioned time interval.</td>
<td></td>
</tr>
<tr>
<td><strong>Body Language</strong></td>
<td><strong>5 points</strong></td>
<td><strong>Delivery</strong></td>
<td><strong>10 points</strong></td>
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<tr>
<td></td>
<td><strong>fast.</strong></td>
<td><strong>The speakers' movements seem natural and reinforce the spoken message.</strong></td>
<td><strong>The speakers made movements and gestures that enhances articulation, and they maintains occasional eye contact with audience.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5 points</strong></td>
<td><strong>The speakers do not meet the audience’s eyes.</strong></td>
<td><strong>The speaker seems nervous and uses gestures that take away from the presentation.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dynamic volume, articulation, and inflection make the speech natural while maintaining audience interest.</strong></td>
<td><strong>Volume, articulation, and inflection are adequate, but delivery lacks naturalness.</strong></td>
<td><strong>Volume, articulation, and inflection are inadequate.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>The speaker appears relaxed and self-confident and does not show evidence of mistakes.</strong></td>
<td><strong>The speaker makes minor mistakes, but quickly recovers from them; s/he displays little or no tension.</strong></td>
<td><strong>Frequent mistakes were made in presenting.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Evaluator Comments:</strong></td>
<td><strong>Speakers appear as if they did not prepare for the presentation.</strong></td>
<td></td>
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</tr>
</tbody>
</table>

Total: 50

*Adapted from Northwest Regional Educational Laboratory, http://www.nwrel.org/*
INTRO TO WORK TYPES AND THE WORK ORDER RODEO

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.
- Identify activities that are FOSP and RPSO
STUDENT EXERCISE: THE WORK TYPE COUNTY FAIR

1. Emptying trash cans in the comfort station =
2. Re-glaze windows on historic structure =
3. Re-paving roads =
4. Snow and ice removal =
5. Repair park signs damaged by vandalism =
6. Remove tree dangling over house after a winter storm =
7. Convert historic barn into offices for park interpretive staff =
8. Patch potholes in main park road (has not been done for five years due to lack of funding) =
9. Replace door with appropriate-size door to fit a wheelchair =
10. Mowing =
11. Replant bulbs in a cultural landscape on an annual basis =
12. Build a loop with 12 sites in the campground =
13. Replace a roof that is five years past its design life =
14. Refinish wood floors in park residence =
15. Litter pickup around the outside of the Visitor Center =
16. Annual fire extinguisher inspection =
17. Perform a comprehensive condition assessment of a building’s fire sprinkler system =
18. Complete an annual condition assessment at park headquarters =
19. Prepare for seasonal trail closing =
20. Immediate repairs to a blow out of a major water line =
21. Build new visitor center at park headquarters =
22. Winterize fountain =
23. Service HVAC system =
24. Make temporary repairs to road washed out in storm =
25. Seasonal cleaning of gutters =
26. Complete a comprehensive condition assessment of the maintenance building =
27. Demolish an Optimizer Band 5 building at the park =
28. Move sink to appropriate height in ADA-designated housing unit =
29. Add a new wing to the old visitor center =
30. Semi-annual grading of unpaved roads =
31. Repair stucco walls on historic church biannually =
32. Initiate rodent control =
33. Immediate repairs to broken residential water line =
34. Correct deficiencies found during an annual inspection and testing of structural fire systems =
35. Professionally steam clean carpet (every two to five years) =
36. Replace carpet that is beyond its design life and has not received proper funding =
37. Repaint park signs (on an annual basis) =
38. Attend a training session on supervision =
39. Repair hole in roof due to hurricane =
40. Replace roof on park building at the end of its estimated design life =
41. Prune shrubs and trees around visitor center =
42. Paint the exterior of a park building =
43. Inspect and maintain generator =
44. Replace siding on entrance station building =
45. Repair cracks in plaster on walls and ceiling =
46. Carcass removal =
47. Monitor water quality for the water system =
48. Supervision time of a PMIS project by a permanent employee =
49. Enter FMSS actuals and also do the payroll =
50. Empty dumpsters and drive to the landfill =
51. Treat building for termites =

Work Types

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

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

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

Sub Work Types

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

FM – RM (Recurring Maintenance)
   Work activities that recur based on normal wear patterns on a periodic cycle of greater than 1 year and less than 10 years. Typical work includes painting, caulking, sealing, carpet cleaning, etc.

FM – CM (Corrective Maintenance)
   Unscheduled reactive repairs that would not be estimated and planned, but are accomplished by local staff or existing service contractors.
FM - CR (Component Renewal)
- The planned replacement of a component or system that will reach the end of its useful life based on condition and life cycle analysis within the facility's lifetime.

FM - DEM (Demolition)
- Removal of an asset that has been determined to be unsafe or no longer meets mission goals. Removal of an NPS asset is determined by management in conjunction with NPS planning procedures.

FM - EM (Emergency Maintenance)
- A maintenance task carried out to avert an immediate hazard, or to correct an unexpected failure.

FM - INAC = Inspection Accessibility Assessment
FM - INCAA = Inspection Condition Assessment - Annual
FM - INCAC = Inspection Condition Assessment - Comprehensive
FM - INFPLSA = Inspection Fire Protection Life Safety
FM - INFPCA = Inspection Fire Protection Condition Assessment
FM - INOT = Inspection Other types of Inspection
FM - DM (Deferred Maintenance)
- Maintenance that was not performed when it should have been, or was scheduled and was put off or delayed. Continued deferment of maintenance will result in deficiencies.

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

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

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

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

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

FM - RMDM (Recurring Maintenance, Deferred Maintenance)
- Recurring maintenance that has been identified and tracked in the system and facility management practices and is not funded when required will move into this work category.
FM-ICM (Interim Control Measure)
A temporary measure established to decrease the risk of injury until a permanent solution can be implemented or funded.

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

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

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

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

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

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

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

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

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

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

FO-ICM (Interim Control Measure)
A temporary measure established to decrease the risk of injury until a permanent solution can be implemented or funded.

**Capital Improvement (CI)**

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

**CI – EP (Energy Policy)**
Installing or constructing energy efficient components or assets.

**CI – LM (Legislatively Mandated)**
Not specifically identified by another sub-work type.

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

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

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

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

**CI – NC (New Construction)**
Construction that adds to the existing footprint of an asset, or creates a new asset.
RPSO – Real Property Standing Order
RPSO work orders will retain the same WO number for the life of this software. The funding will be closed out at the end of each fiscal year, causing all active child work orders to be closed in preparation for the new fiscal year funding. Any work continuing into the following fiscal year will require establishing a new follow-up work order. The difference is that there are three to six RPSOs for each location record. Most locations will have only three RPSOs, one for each descriptor:

- PM – Preventive Maintenance
- INS – Inspection
- CM – Corrective Maintenance

FOSP – Facility Operations Standing Parent
These standing work orders are associated with the park location record. There are only 13 FBMS FOSP descriptors, requiring one FOSP work order for each descriptor in a park unit. These are similar to the FO sub types with the exception of the Operate Plant System (PS) sub type. It is broken into four additional classes. The designations are:

- FA – Activate-Deactivate
- FE – Electric Plant
- FT – Water Treatment
- FW – Waste Water Treatment
- FH – Heat Plant Ops
- FG – Grounds
- FP – Pest Control
- FS – Solid Waste Management
- U0 – Utilities
- FC – Custodial
- FI – Interim Control Measure
- FD – Snow/Debris Removal
- Y0 – Support

Like the RPSO, the FOSP work orders will retain the same WO number for the life of this software. However, the funding will be closed out at the end of each fiscal year, causing all active child work orders to be closed in preparation for the new fiscal year funding. Each year new FO work orders should be created for each asset.
DATA-DRIVEN DECISION MAKING

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.
Data-Driven Decision Making Example

Steps

<table>
<thead>
<tr>
<th>Order/Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>My wallet is missing!</td>
</tr>
<tr>
<td>2</td>
<td>I went to the grocery store to pick up a meat thermometer because I’m tired of the Salmonella scares. I went with Christie MacCormuck as she was particularly worried that I would not purchase a thermometer. When I reached home, I noticed my wallet was gone.</td>
</tr>
<tr>
<td>3</td>
<td>First hypothesis: I lost it somewhere in the grocery store. Second hypothesis: Christie has my wallet.</td>
</tr>
<tr>
<td>4</td>
<td>First hypothesis: I should go to the grocery store and retrace my steps and ask customer service if they have my wallet. Second hypothesis: Go to Christie’s place and ask her if she has my wallet.</td>
</tr>
<tr>
<td>5</td>
<td>First hypothesis: I did not see it anywhere in the store and customer service does not have it. Second hypothesis: She confirmed she had picked up my wallet when it fell out inside the grocery store.</td>
</tr>
<tr>
<td>6</td>
<td>The data suggests that both of my hypotheses are supported.</td>
</tr>
<tr>
<td>7</td>
<td>Christy found my wallet and gave it back to me...</td>
</tr>
</tbody>
</table>

*Note: the Scientific Method is a revolving process and once the results are reported there is generally another problem to be stated and researched.
Data-Driven Decision Making Practice 1

Steps

<table>
<thead>
<tr>
<th>Order/Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – State the Problem</td>
<td>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.</td>
</tr>
<tr>
<td>2 – Gather Information</td>
<td>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.</td>
</tr>
<tr>
<td>3 – Develop a Hypothesis</td>
<td>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.</td>
</tr>
<tr>
<td>4 – Experiment (Gather Data)</td>
<td>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?</td>
</tr>
<tr>
<td>5 – Analyze Data</td>
<td>After some research, it is learned that the Plover has predators that can be found on the island, such as raccoons.</td>
</tr>
<tr>
<td>6 – Draw a Conclusion</td>
<td>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.</td>
</tr>
<tr>
<td>7 – Report Results</td>
<td>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.</td>
</tr>
</tbody>
</table>
Data-Driven Decision Making Practice 2

Steps

<table>
<thead>
<tr>
<th>Order/Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The SEOT Facility Manager is noticing he needs to replace the main maintenance building’s outside air conditioning unit. This strikes him as odd because the unit is definitely short of its expected lifecycle.</td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
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<tr>
<td>4</td>
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</tr>
<tr>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>
Terminology

**Average** - a single value (as a mean, mode, or median) that summarizes or represents the general significance of a set of unequal values

**Data Collection** - systematic gathering of information for a particular purpose

**Hypothesis** - a tentative assumption made in order to draw out and test its logical or empirical consequences

**Inference** - the process of drawing a conclusion with some degree of certainty based on random sampling

**Median** - a value in an ordered set of values below and above which there is an equal number of values or, if there is no one middle number (i.e., if there is an even number of values), the arithmetic mean of the two middle values

**Mode** - the most frequent value of a set of data

**Multiple Trials** - repetitions of an experiment (the more trials, the more statistically valid your data)

**Multivariate** - involving a number of distinct, though not usually independent, random variables

**Outlier** - a value that deviates markedly from the other values in a set of data

**Parameter** - a characteristic, feature, or measurable factor that can help define a particular system

**Reliability** - the degree to which a process produces a consistent and predictable result repeatedly

**Skewness** - asymmetry in the distribution of the sample data values

**Statistical Significance** - the probability that an observed relationship or difference in a sample is not due to chance (tells us the degree to which a result is "true")

**Trend Analysis** - the practice of collecting information and identifying a pattern or trend within it

**Validity** - the extent to which a concept, conclusion, or measurement is well founded and corresponds accurately to the "real" world
Fleet Vehicle Update: Moving towards eco-efficiency

The SEOT AO just found out there may be additional funding specifically for purchasing new fleet vehicles. The AO informed the Superintendent and he sent an email to the chief of Facility Management. The current stake trucks are approximately 10 years old and nearing the end of their lifetime. The Superintendent is interested in buying new, eco-efficient vehicles to replace the aging fleet.

The Superintendent sent you the email below.
Dear Chief,

In light of our commitment to sustainable practices, I am charging you with the task of researching greener alternatives for updating SEOT’s maintenance vehicle fleet. In the past few decades, numerous options have become viable (e.g., biodiesel, electric, and propane fuel sources). You will most likely find some options to be more environmentally friendly than others. While I am concerned about our environmental footprint, I am also concerned about the vehicle’s longevity and the total cost of ownership. Keep this in mind while researching.

As you and your staff are the primary operators of these vehicles, and you best understand the operations and maintenance needs for SEOT, you are the best candidate for conducting and analyzing the research. In the near future I expect you to complete the research and prepare a short presentation reviewing your findings. Be prepared to discuss vehicle costs (up-front and long-term), effects on operations, fueling stations requirements, etc.

Be prepared to brief members of the SEOT management team at the squad meeting today after lunch. You will have 5 minutes to brief the team.

I look forward to seeing what you come up with for us.

Steve Wolter
Superintendent
Sea Otter Island National Park
Phone: 555-698-6555
STRENGTHS BASED LEADERSHIP

Objectives: At the end of this session, students 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 competency and capacity of a team or organization.
- Apply specific strengths from themselves and an assigned team in an assigned park unit scenario and complete all assignments using the team’s strengths as a basis for work.
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 pleasures 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 to-ward 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. Like wise, 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 con trolling 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.
Excel Murder Mystery
Lawyer James MacAfee was murdered this morning in his office at Facilicorps HQ. Although there were no eyewitnesses, there were clear signs of a struggle, and, in the tussle, the murderer accidentally left a great deal of evidence at the scene. Everyone in the company is a suspect. Using the following clues, sift through the information on the Mystery tab of your Excel file to find out who the murderer was. And hurry—we don’t have much time!

Figure 1: The corner of a monthly pay stub. The last two digits of the employee number are 35. The monthly amount distributed was $2,803.

Figure 2: Shards of glass from a broken pair of glasses found at the scene. (NOTE: MacAfee doesn’t wear glasses.)

Figure 3: Two footprints with a stride of 28” (NOTE: an average person’s stride is .4 of their height)
Excel Order of Operations: Murder Mystery

Student Name: _______________________

Please describe the actions you took for the figures in the Mystery.

<table>
<thead>
<tr>
<th>Figure 1</th>
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<th>Figure 3</th>
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Who was the murderer? ________________________
INFORMAL VISITOR CONTACTS

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.
Overview of the Types of Informal Visitor Contacts
There are three main types of informal visitor contacts: orientation, information, and interpretation. The sequence of these contact options is known as the interpretive continuum.

1. At the orientation level, the main goal of the contact is to help visitors get their bearings and provide directions.

2. At the information level, the contact involves facts or explanations.

3. The interpretation level of the continuum moves beyond information and involves providing opportunities for visitors to form their own connections with the significance of the resource. To do this, the tangible resource is linked to an intangible concept using techniques (such as stories, examples, and comparisons) that are appropriate for the audience, the resource, and the employee. Most maintenance employees will not have the opportunity to take an informal visitor contact to the interpretation level. It is best for these types of interactions to be referred to an interpretive park ranger.

An informal visitor contact can begin at any point along the continuum. Where the contact begins is determined by the visitor and the cues they communicate. Often these cues are visitor questions.
"Where" questions are usually orientation opportunities.

- Example:
  Where is the bathroom? Where can I fish? Where can I see big cannons?

"What" and "how" questions are usually information opportunities.

- Example:
  What kind of flower is that? What happened here? How did this valley form?

"Why" questions typically offer an opportunity for interpretation.

- Example:
  Why was this site so important in the war? Why are those trees dying?

Defining Orientation, Information, and Interpretation in Informal Visitor Contacts

**Orientation**

Orientation refers to concepts such as direction, location, proximity, way-finding, etc. In the orientation process, employees help visitors understand where they are and how to get where they need to go. Orientation may also involve helping visitors understand what opportunities are available at your site. Visitors who are properly oriented will be more likely to have a quality experience and be more open to receiving and understanding park messages. Orientation fulfills the basic needs of survival and safety. These needs must be met before visitors are willing or able to make larger connections to park resources.

Your staff should be prepared to answer orientation answers. Visitors do not always understand the difference in job duties when they see a person in uniform; they only see a ranger. They expect that uniformed ranger to be able to answer their questions, especially if it is an orientation question like the location of the campground.

*Example of an Orientation Question:*

Q: Where can we go to see a condor?

A: They can be found anywhere in the Grand Canyon region and, though this is not very predictable, I can tell you that yesterday a pair were seen near the North Rim Lodge.

**Information**

Information about the resource provides an important context for the visitor’s experience, answering the questions that visitors have with tangible details about the resource. Information fulfills visitors’ needs for knowledge, which enhances their self-esteem. It may also fulfill belonging needs.
Employees have a responsibility to ensure the accuracy of all information they pass on to the public. All too often, we are guilty of accepting what we hear from others as truth. Just because you heard a co-worker say it, or heard it during an interpretive program, doesn't mean that it is accurate. When employees pass on inaccurate information—and the audience knows it—their credibility suffers. When one employee is discredited, the credibility of all employees comes into question.

This level of credibility means it is extremely important for your staff to be able to provide accurate information. Your role as a supervisor is to make sure they have the resources and knowledge they need to accurately provide information. However, it is also important that your staff understand that they may not know the answer to every question, and that is okay. They need direction from you on where to direct these visitors in those instances.

**Examples of Information Questions:**

Q: How many people lived in the fort?
A: The number fluctuated seasonally, but the average was around fifty people. There were five gentleman officers and their families, a doctor and his family, servants, and cooks. Hundreds of other laborers lived in villages surrounding the fort.

Q: What are all those piles of wood along the road?
A: Those are slash piles waiting to be burned. Forestry crews trim back 100 feet from the road and place all of the woody debris in piles to be burned during winter.

**Interpretation**

Interpretation provides opportunities for visitors to form their own meaningful connections (emotional and/or intellectual) with the resources in our parks. Interpretation meets higher-level needs for understanding and self-fulfillment. Information can be presented at increasingly complex levels, leading to opportunities to connect visitors to the significance of the resource. These opportunities do not happen frequently, but they are a powerful way to help maintain the site resources. Visitors who care about the resource will help employees care for it.

It is not necessary for your staff to be able to provide interpretive opportunities. Your employees have a very different skill set and job role in the park, and it is acceptable to instruct your staff to direct visitors who have more in-depth questions to the interpretive staff at your site. That is still meeting the needs of the visitors, and it allows your staff to continue with their day-to-day responsibilities.

**Example of an Interpretation Question:**

Q: Why did the strike start?
A: The workers were told that many of their jobs were going to be automated. Can you imagine how threatened or vulnerable you would feel if your boss told you that your job was going to be replaced by a computer? That threat of losing their job, their livelihood, and their way of life likely sparked the strikers into action.
Customer Service

Introduction to Customer Service
It is appropriate that “service” is a part of the name of the National Park Service. Our desire to serve influences our priorities as an agency and as individuals. How we appear, act, and interact with visitors greatly affects not only the quality of their visit, but also the quality of the support our agency and our agency’s mission receives. For employees of the National Park Service, superior customer service should be a top priority. To ensure that you and your staff deliver high-quality customer service, you should have a plan for presenting a professional image, professional behavior, and effective interpersonal communication skills.

Exhibiting a professional image includes attention to the following:

- **Personal Grooming:** Hair, teeth, and nails should be clean and neat. Excessive colors and styles of hair and nails should be avoided.

- **Posture:** Standing up straight projects an image of authority and inspires confidence in your knowledge and abilities.

- **Attire:** Your attire should not distract the visitor during their experience at the site. Be aware of the following professional image standards:
  - Clothes should be clean and neat at the beginning of the workday.
  - Clothes should not be frayed, have holes, or be missing buttons.
  - Clothes should be free of odors.
  - Clothes should not be excessively tight or baggy.

- **Accessories:** Your accessories, like your clothes, should not distract the visitor in any way. The following professional standards apply:
  - **Tattoos** should be covered to the greatest extent possible.
  - **Jewelry** should be conservative. Excessive numbers, large size, and bright or contrasting colors of jewelry may create an unprofessional appearance. In addition, supervisors and managers may have to limit jewelry wear for safety reasons.
  - **Rings and Studs** associated with body piercing should be removed (where visible) to prevent interfering with visitors’ experience.
  - **Sunglasses** that are dark enough to make it difficult or impossible to see your eyes should be worn in visitor contact situations only when absolutely necessary. Mirrored sunglasses should never be worn. Sunglasses rims should be in conservative colors such as gray, black, or brown; bright or neon colors should be avoided.
The Components of Professional Behavior
Displaying professional behavior includes being:

- **Courteous**: Professionals are courteous (polite, well-mannered, patient, pleasant, attentive, and serious). They act naturally and genuinely, but professionally. They may try to be friendly and establish rapport with visitors by taking interest in some aspect of their lives, and by finding common understanding, to personalize the contact. They tailor their approach to the individual. This means putting the visitors’ needs above your own needs, to the extent that it is reasonable to do so, which includes halting your own activities or conversations with coworkers in order to serve the visitor first. Courteous employees go beyond the Golden Rule, “Do unto others as you would have them do unto you,” to practice the Platinum Rule: “Treat others not only as you want to be treated, but as they want to be treated.”

- **Helpful**: Professional employees are helpful. When possible, they make themselves accessible and approachable (smiling and welcoming—exhibiting body language that puts others at ease).

- **Knowledgeable**: Visitors expect you to be knowledgeable about every aspect of their experience. Employees who respect others will anticipate questions and get to know their park well. You should know the names of people and places associated with your site; contact information for common referrals; facilities and services available to the visitor; how to give clear, simple, accurate directions; how to describe the resources of the park and offer alternatives; all policies, procedures, and systems of your operation; how to use equipment properly; and current or updated information.

- **Neutral**: As a public servant it is important to remain neutral in all situations. Your beliefs and attitudes should not interfere with the visitor’s experience of the resource. You should avoid presenting personal opinions on politics, religion, or even local businesses, and should avoid talking about fellow staff or other visitors in public. To ensure a quality visitor experience, stick to the facts, admit it when you don’t know something, and offer to help the visitor find out what they need to know.

- **Objective**: Professional employees respect others enough to have an objective attitude toward all. They put their personal biases or baggage away (their beliefs, values, experiences, and prejudices) in order to provide equal treatment and fairness. You should avoid sharing personal perspectives, provide official rather than personal positions, and seek balance in all you say.

- **Patient**: Professional employees remain patient with all visitors. While it may be the tenth time you’ve heard the same question, it is this visitor’s first time asking it. Staying focused on the visitor’s experience and perspective will help you handle each contact with patience and compassion.
Safe: Some interactions escalate to involve real risk when there are verbal threats along with physical proximity. It is important to be able to recognize the signs of potentially dangerous interactions, to know how to distance yourself from an encounter safely, and to know when and how to request assistance from law enforcement personnel. Other skills to develop for these interactions include articulation, delivery, creativity, flexibility, and even humor.

The Components of Effective Interpersonal Communication

Being adept at interpersonal communication includes knowledge of the following:

- **Body Language Skills**: Physical distance from visitors should be based on their personal space, and be distant enough (generally over three feet) that the audience feels comfortable and not threatened. To communicate openness and interest, your body should angle or lean toward the audience. A person who remains still is likely paying attention to what is happening, while tapping or fidgeting may communicate impatience or boredom. Arms that are crossed often indicate an attitude of disapproval or opposition, and hands in pockets may communicate a negative attitude. Arms that are open (to the side of the body or behind the back) show a willingness to engage. A straight head position may indicate authority and seriousness, while friendliness or receptivity can be shown by tilting the head slightly to one side or the other. The use of touch may or may not be appropriate, depending on the situation. Your facial expression can express much in an interaction, so employees should avoid having their faces covered by their hair, hat, or sunglasses whenever possible. You can communicate openness, confidence, and honesty with an open facial expression and solid eye contact.

- **Conflict Resolution**: Occasionally, informal visitor contacts will involve a conflict between the employee and the visitor. Conflicts may be based on perceptual differences, value differences, divergent goals, or ineffective communication that leads to misunderstandings. Rather than thinking of the conflict as a win/lose situation or as something to be avoided altogether, try thinking of a solution in which both parties win. The type of conflict resolution that is most effective in meeting the needs of both sides is collaboration. Try solving a problem, rather than arguing with, blaming, directing, or persuading the other person. Apologize when appropriate and ask visitors what they would like you to do about their concerns. Use common sense to identify possible solutions, and take action to meet the visitors’ needs when possible. If you can’t solve a problem, connect the visitor with someone who can.

- **Listening Skills**: Speaking is only half of communicating. Listening is vital in a conversation as well. Listening is essential to seeing the speaker’s point of view, recognizing that each individual perceives things differently and that multiple points of view can provide a wider perspective on a situation. Good listeners listen carefully to hear and to understand, not only to respond. They do not jump to conclusions, and do not interrupt except when necessary. A good listener actively listens by reacting and acknowledging what was said. Techniques for
active listening include using all senses to read the unspoken message or the question beneath the question; making eye contact and facing toward and concentrating on the speaker; occasionally nodding or repeating what was said; recognizing the speaker’s feelings and concerns; and asking for clarification when necessary.

- **Verbal Skills**: Verbal skills include the ability to effectively use language and vocal techniques. An effective communicator chooses words that will be understood by a given audience. Vocabulary should be selected based on a variety of factors, including the audience’s age, culture, educational background, and experience with the subject at hand. When speaking with strangers, or with visitors for whom English is a second language, it may be useful to develop not only a more universal vocabulary, but a neutral accent. For most audiences it is best to avoid using complex, technical jargon and slang terms. Vocal techniques that aid in communication include articulated diction, moderate tempo with rhythmic variation for effect, modulation to emphasize certain words, moderate tone or pitch, and appropriate volume and vocal quality. There is no substitute for a positive tone of voice.
# STUDENT ACTIVITY

Quality Customer Service Worksheet

**Directions:**
In the chart below, rate your own delivery of each component in customer service as either "pretty good" or "could improve." Use the Customer Service section in your student manual if you need more information about each component.
For each component in which you rate yourself as "pretty good," describe your strengths. Be sure to include at least one specific thing you do that justifies your rating.
For each component in which you rate yourself as "could improve," describe your weaknesses. Be sure to include at least one specific thing you do that justifies your rating.
Use this as a tool to train your staff in quality customer service after you return to your park.

<table>
<thead>
<tr>
<th>COMPONENT</th>
<th>RATING (PRETTY GOOD OR COULD IMPROVE)</th>
<th>STRENGTH/WEAKNESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROFESSIONAL IMAGE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COURTEOUS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HELPFUL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KNOWLEDGEABLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NEUTRAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OBJECTIVE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PATIENT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COMPONENT</td>
<td>RATING (PRETTY GOOD OR COULD IMPROVE)</td>
<td>STRENGTH/WEAKNESS</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>SAFE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BODY LANGUAGE SKILLS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONFLICT RESOLUTION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LISTENING SKILLS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VERBAL SKILLS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Visitor Cues

Overview of Visitor Cues
Reading the visitor appropriately is perhaps the most fundamental skill necessary for successful informal visitor contacts. How do you know how to respond to visitors until you know what they need? By learning how to identify, read, and respond to visitor cues you will hold the key not only to quality customer service, but to meaningful experiences for the visitor. Visitors let us know their needs using verbal communication, body language, tone of voice, and direct actions.

Types of Visitor Cues

Verbal Communication
Visitor needs can be determined instantly when a visitor asks a simple question, but beware of reaching conclusions too quickly. While a visitor asking for directions to the bathroom is rarely seeking something other than immediate orientation and relief, an individual may not always know exactly how to phrase the question they really want answered. The question “Where is Klickitat Point?” could be answered simply with directions, but the visitor may also want information about what can be seen at Klickitat Point.

Body Language
Body language can convey a surprising amount of information about visitor needs and wants. In fact, much of what you are trying to communicate may be relayed through your body language. For example, if a visitor asks a question while turning away toward a trail, they likely want quick answer before they start their hike. But what if they lean towards you and smile while they ask the question? Is a yes or no answer all they want? What if they scowl and cross their arms? Are they looking for a simple answer or do they want to be engaged? By reading the cues of body language you may begin to have a deeper sense of the visitor’s needs. Use the following handout to learn more about visitor cues and their meanings.

Tone of Voice
Tone of voice can also provide a sense of a visitor’s attitude and predisposition. Again, using the example of the visitor asking about the trail, listening carefully to pitch, tone, inflection, and volume can give a sense of where to go with the contact. For example, if the visitor asks about the trail in a high-pitched quizzical voice, you might assume that they are in a friendly, receptive mood. If they ask the same question in a deep, gruff, barking manner you might assume that they are upset and perhaps angry or defensive.

Actions
By watching the actions of your visitors, you may also gain clues to their needs. Careful observation may help you see when visitors have barriers to mobility, hearing, vision, language, learning, or other issues. How you proceed may depend on those observed issues.

Additionally, you may encounter visitors violating safety regulations. This is a very likely possibility for your staff as they work throughout the park. Knowledge of the regulations
and observation of those violations give you a unique perspective on the needs of the visitor. For example, perhaps you notice a visitor walking dangerously close to a wild bison. The visitor may feel a need to interact with the wildlife or to get that perfect photo, but you know that they also have a more immediate need for safety. Informing your staff of ways to handle potential safety violations will enable them to conduct better informal visitor contacts that also keep themselves, the resource, and the visitors safe.

In your role as a supervisor, it may also be helpful to provide this information to your staff when training them in informal visitor contacts.
Reading and Projecting Cues Handout

Body Language
Here are some cues that may indicate that a visitor is interested:
- Angling or leaning their body towards you can show that they value what you’re saying.
- Arms that are open (to the side of the body or behind the back) show a willingness to engage.
- A person who remains still shows he or she is paying attention.
- Relaxed lips show comfort.

Here are some cues that may indicate that a visitor is not interested or disapproves:
- Stepping back, turning aside, or walking away indicates lack of interest.
- Crossed arms often indicate an attitude of disapproval or opposition.
- Tapping or fidgeting can communicate impatience or boredom.
- Agitated gestures may indicate disapproval.
- Avoiding eye contact may signal a lack of respect or interest.
- Pursing or twisting lips to the side might show that they are thinking or holding back a negative comment.
- Downward turns or flat lines indicate disapproval.
- Lips pressed together indicate tension.
- Yawning, hands in pockets, slouching, or looking away may indicate that the visitor is bored.

Tone of Voice
Tone of voice can provide a sense of a visitor’s attitude and intentions. Listening carefully to the pitch, tone, inflection, and volume can give a sense of where to go with the contacts.

PAY ATTENTION TO THE CUES YOU ARE PROJECTING

Body Language Skills
- Stand up straight: this inspires confidence in your knowledge and abilities.
- Maintain personal space: As a safe rule, keep over three feet between you and the visitor.
- Communicate openness: Angle or lean your body toward the visitor to show you value what he or she is saying. Arms that are open (to the side of the body) show a willingness to engage.
- Show interest: A person who remains still shows he or she is paying attention. Tapping, fidgeting, or rocking back and forth can communicate impatience or boredom.
- Be positive: Crossed arms often indicate an attitude of disapproval or opposition. Hands in pockets may communicate a negative attitude. A smile and eye contact are good ways to indicate a positive attitude.
• Be friendly: Tilting the head slightly to one side or the other indicates friendliness.
• Show authority: If you need to show authority, a straight head position and posture is effective.
• Be careful about touching the visitor: As a general rule it is not a good idea to touch the visitor. However, there may be situations in which it is appropriate. Use your best judgment and consult with your supervisor if you need guidance.
• Make eye contact: Keep eye contact for around two-thirds of the time to show attentiveness without making other people feel self-conscious. Too much eye contact may be seen as intense or aggressive, while too little may signal a lack of respect or interest.
• Watch your mouth movements:
  o Pursing or twisting lips to the side shows you’re thinking or holding back a negative comment.
  o Downward turns or flat lines indicate disapproval.
  o Lips pressed together indicate tension.
  o Relaxed lips show comfort.
  o Turning your mouth up is a positive signal. A genuine smile may put others at ease, so if you feel like smiling, let your face help visitors loosen up.

Verbal Skills
• Choose words that the audience can understand. Factors to consider about your audience when selecting your words include:
  o Age
  o Language skills (native speakers or international visitors)
  o Education level
  o Experience with the subject you’re talking about.
• Try to speak with correct grammar. In general, avoid jargon and slang.
• Speak plainly. Try practicing different ways of pronouncing words so that visitors from varying backgrounds may have a better chance of understanding you. If you have an accent, be aware that your accent may be difficult for others to understand.
• The way you use your voice can enhance your communication skills. Techniques include:
  o Saying each word clearly.
  o Speaking at a medium speed, not too slow or too fast.
  o Varying the rhythm of your words for effect.
  o Emphasizing certain words.
  o Using a comfortable pitch.
  o Keeping your volume to an appropriate level.
  o Using a positive, cheerful tone of voice when appropriate.
  o Support your voice by breathing deeply and evenly.
Listening Skills

- There are benefits to developing your listening skills including:
  - Understanding where the speaker is coming from helps you communicate your point of view more clearly.
  - Recognizing multiple points of view provides you with a wider perspective on a situation.
  - Hearing a different opinion gives you a chance to learn something new.
  - The following techniques can help you become a better listener:
    - Use your body language to create a listening climate: maintain eye contact, keep your body pointed to the speaker, and nod your head to provide the visitor with cues you are listening.
    - Use words to show you’re listening. Helpful phrases include: “I see,” “Yes,” and “Good point.”
    - Ask open-ended, non-confrontational questions. These invite the speaker to tell more about their concerns, expectations, and interests. For example:
      - “Can you tell me more about...?”
      - “What did you mean when you said...?”
    - Restate in your own words (that is, paraphrase) what the visitor has said:
      - “So, you believe strongly that...”
      - “The way you see it...”
      - “You were very unhappy when...”
      - “You felt quite angry with...”
      - “What I hear you saying is, you...”
  - After summarizing what the visitor has said, ask if your understanding is accurate and complete.

Courtesy & Helpfulness

- Ask yourself what you might be able to do for the visitor.
- Ask the visitor if there is anything else you can do to help them.
- Greet visitors promptly. Each visitor should be greeted within one minute of their arrival. If you are busy helping someone else, acknowledge new arrivals with eye contact, a nod, and a smile, and let them know you will be right with them. Immediately end conversations with co-workers and take a break from any projects you might be working on.
- Balance quality with quantity. When necessary, keep contacts short but effective. Printed material can support a contact but should never be a substitute for a personal conversation.
- Be empathetic. Think about how important your leisure time is to you, and transfer those feelings to your visitors, trying to make their experience as enjoyable as possible.
Objectivity/Neutrality

- Avoid presenting personal opinions on politics, religion, and local businesses.
- Keep your beliefs, values, and prejudices to yourself.
- Refrain from talking about other visitors or staff in public.
- Provide official positions when necessary.
- Be balanced in all you say.
**STUDENT ACTIVITY**

**Know Your Site**

**Directions:** In this activity you will be identifying and preparing potential answers for the questions you and your staff hear most often during your informal visitor contacts.

1. Develop a list of at least six frequently asked questions at your site.
2. Write answers to those questions.
3. Identify ways you can help your staff answer these questions more effectively.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Method to Help Staff Answer Question Effectively</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMPLE: How do I get back to the highway from here?</td>
<td>EXAMPLE: Go to the stop sign, turn left, drive about 3 miles, and make a right at the ranger station. Highway is about two miles straight ahead.</td>
<td>EXAMPLE: Provide maps to staff to carry with them as they work in the park, provide orientation training about local roads and travel.</td>
</tr>
</tbody>
</table>
ASSET MANAGEMENT PLANNING

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.
CAPITAL INVESTMENT STRATEGY

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.
PROJECT PLANNING

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.
Sphagnum Historical Society’s
Annual SEOT Salmon Festival
Project Plan

Project Summary

<table>
<thead>
<tr>
<th>Start Date: 3/15</th>
<th>End Date: 10/31</th>
</tr>
</thead>
</table>

**Project Abstract:** The Sphagnum Historical Society in cooperation with the Confederated Tribes of the Oregon Coast holds a two-day festival at the Coho Fishing Village in SEOT to celebrate the return of the spawning salmon to nearby lakes and creeks. The event includes “spawnsors” in the form of vendors and food sales booths. There will be demonstrations as well as entertainment.

**Purpose of Project Plan**
This Project Plan describes what work the SEOT Special Event Project Team—composed of representatives from SEOT—will do, what results will be achieved, and how project work will be executed and managed. It describes team roles and responsibilities and deliverables. It identifies assumptions, constraints, dependencies, risks, and issues, and it provides high-level schedule and budget information.

**Background**
This is the proposed second year of the Salmon Festival at SEOT. As analyzed from the original permit, it was asserted by the Superintendent that the proposed activity had a meaningful association with, or is in keeping with, the purpose of why the park was established, particularly regarding the interpretive message of SEOT. Last year, the two-day festival welcomed approximately 1200 visitors, and a slight increase in visitation is expected this year due to the increase in vendors and events.

**Goal and Objectives**
The overall goal of this project is to assist in providing enjoyment to visitors during the festival while ensuring that resource impacts, visitor experience, and park operations are not significantly impacted.

The objectives for the Sphagnum Historical Society’s Annual SEOT Salmon Festival are:
- Address all impact dimensions for the festival (resource impacts, visitor experience, operations).
- Outline mitigations for all impact dimensions that may be revealed.
- Develop permit conditions for the festival.
- Calculate the cost recovery to the park.
Scope
This section summarizes the scope of the proposed project by providing a list of key activities and deliverables. In the table below, list (i) the activities the team will do and (ii) the activities the team will not do but that a reader might mistakenly believe the team is doing.

The scope of this project is outlined in the table below.

<table>
<thead>
<tr>
<th>In Scope</th>
<th>Out of Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write and deliver project plan to Superintendent</td>
<td>Sharing of project plan outside of SEOT staff</td>
</tr>
<tr>
<td>Process all permit applications including Commercial Use Authorizations for all Vendors</td>
<td>Attend any festival planning meetings except as they apply to park operations</td>
</tr>
<tr>
<td>Secure the services of the NPS Public Health officer (in Portland)</td>
<td>It will be out of scope for the SEOT staff to work with the County Health Department</td>
</tr>
<tr>
<td>Define impacts to the resources, visitor experience, and park operations</td>
<td></td>
</tr>
<tr>
<td>Develop permit conditions for the Sphagnum Historical Society</td>
<td></td>
</tr>
<tr>
<td>Calculate cost recovery</td>
<td></td>
</tr>
<tr>
<td>Monitor the event</td>
<td>Develop any media materials or Park official announcements on the Historical Society’s behalf</td>
</tr>
<tr>
<td>Write an after-action report</td>
<td></td>
</tr>
<tr>
<td>Create administrative record for project</td>
<td></td>
</tr>
</tbody>
</table>

Assumptions and Constraints
An assumption is a circumstance or event outside the project that can affect its success and that the authors of this plan believe will happen. Constraints are restrictions or boundaries placed upon the project that limit the choices of the project team. The assumptions and constraints for the Sphagnum Historical Society’s Annual SEOT Salmon Festival project are listed in the table below.

<table>
<thead>
<tr>
<th>Assumptions</th>
<th>Constraints</th>
</tr>
</thead>
<tbody>
<tr>
<td>There will be one point of contact for all matters pertaining to the Salmon Festival (Julian Little)</td>
<td>Because there is only one point of contact, all of Mr. Little’s contact information should be available to park staff, and there should be a back-up contact person identified during the festival</td>
</tr>
<tr>
<td>It is assumed that all permit conditions will be strictly adhered to in order to ensure safety, success, and respect for the resource</td>
<td>There are outside vendors out of SEOT’s control</td>
</tr>
<tr>
<td>It is assumed that the intent and purpose of this festival is aligned with park purpose</td>
<td></td>
</tr>
</tbody>
</table>
Stakeholders
The table below lists stakeholders and indicates how they will be impacted and engaged by the project.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Impact</th>
<th>Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members of Sphagnum Historical Society (SHS)</td>
<td>This is one of the SHS's biggest festivals, and they are aware of how much visitation to the area the festival provides. Their reputation will be impacted if this festival is not a success.</td>
<td>They will be highly engaged from the beginning (planning) throughout the entire cycle of the project.</td>
</tr>
<tr>
<td>Julian Little</td>
<td>Although Mr. Little is a member of the SHS, he is listed separately as the organizer of the festival.</td>
<td>As the main point of contact, he will be highly engaged throughout the process.</td>
</tr>
<tr>
<td>The Confederated Tribes of the Oregon Coast</td>
<td>The tribe will be able to educate the visitors about their customs through the provision of salmon products and methods of preparing salmon.</td>
<td>One of the tribe's members sits on the planning board and others will be significantly engaged during the festival.</td>
</tr>
<tr>
<td>Vendors</td>
<td>As commercial services providers they will expect to profit from the festival. Proper organization of the festival will help to ensure this.</td>
<td>They will be engaged only slightly prior (filling out required paperwork) and during the festival.</td>
</tr>
<tr>
<td>SEOT Park staff</td>
<td>As this is a large festival, most park staff will be on hand for the festival.</td>
<td>Except for McCormick and occasional internal planning meetings, the staff will mainly be engaged during the festival and just after.</td>
</tr>
<tr>
<td>Visitors</td>
<td>End users</td>
<td>They will be engaged only during the festival days.</td>
</tr>
</tbody>
</table>

Deliverables
The project is completed when the deliverables listed in the following table are completed.

<table>
<thead>
<tr>
<th>Deliverable Name</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Plan</td>
<td>Document outlining all processes and documents that need to be present for this special event</td>
<td>Electronic copy stored on shared drive</td>
</tr>
<tr>
<td>Administrative Record</td>
<td>This includes any correspondence such as applications, emails, or other correspondence that pertains to the Festival.</td>
<td>Various (Word documents and electronic copies)</td>
</tr>
<tr>
<td>Special Use Permit</td>
<td>This permit will outline the application fee, performance bond, Liability Insurance, as well as all conditions of the permit.</td>
<td>Word and electronic copy</td>
</tr>
<tr>
<td>Cost Recovery Calculation</td>
<td>The Cost Recovery is the amount that SEOT will charge to the SHS to account for all costs to the park.</td>
<td>Word and electronic copy</td>
</tr>
<tr>
<td>Deliverable Name</td>
<td>Description</td>
<td>Format</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Hosting of event</td>
<td>Although the SHS is putting on the event, it is the face of SEOT that the visitors will see.</td>
<td>Service</td>
</tr>
<tr>
<td>After-action report</td>
<td>A document prepared by McCormick that outlines the festival process, issues, new risks identified, etc.</td>
<td>Word and electronic copy</td>
</tr>
</tbody>
</table>

**Outcomes/Success**

The Sphagnum Historical Society’s Annual SEOT Salmon Festival project is a complex multi-phased project that has multiple objectives as well as stakeholders. The measure of success of the Sphagnum Historical Society’s Annual SEOT Salmon Festival is based on the successful implementation of the festival. Specific outcome and success measures for the Sphagnum Historical Society’s Annual SEOT Salmon Festival:

- The visitors learn about the culture and history of SEOT and return to the island after the festival (as measured by increased visitation).
- There is no impact to the resource as measured by the observation of the Chief of Natural Resources.
- The safety plan that is put in place for the festival is effective enough that there are no visitor or staff injuries.
- The SHS festival is a success as measured by the evaluation and comment of the members of the SHS.
Human Resources
Roles and Responsibilities

The following human resources are required for the project.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve Wolter</td>
<td>Superintendent—Final approval of all permits</td>
</tr>
<tr>
<td>Christy McCormick</td>
<td>Collateral Duty—Special Park Use Permits-Team Leader and liaison between the SHS and SEOT Management Team, Public Information Officer.</td>
</tr>
<tr>
<td>George MacNeil</td>
<td>Public Health Officer—Will provide consultation to vendors in risk reduction and strategies for reducing the potential of foodborne illness, chemical poisoning, or accidental injury</td>
</tr>
<tr>
<td>Mark Tezel</td>
<td>Chief, Resources Management and Park Safety Officer—Will oversee safety operations during the festival and including tear-down</td>
</tr>
<tr>
<td>Christy McCormick</td>
<td>Chief, Interpretation—Will provide interpretive programs for visitors to the festival as well as informal visitor contacts</td>
</tr>
<tr>
<td>Joy Springer</td>
<td>B &amp; U foreman- Will assist Facility Manager in setting up any utilities needed by vendors</td>
</tr>
<tr>
<td>Vicki Garrett</td>
<td>Roads and Trails foreman- Will create Traffic Management Plan for the festival</td>
</tr>
<tr>
<td>Angela Bailey</td>
<td>Maint, Mechanic—Monitor and set-up</td>
</tr>
<tr>
<td>Jenny Demas</td>
<td>Chief, Visitor Services and Protection —Monitor and oversight of set-up and tear-down</td>
</tr>
<tr>
<td>Andrew Levin</td>
<td>Ranger—Traffic control</td>
</tr>
<tr>
<td>Gail Brock</td>
<td>Ranger—Traffic control</td>
</tr>
<tr>
<td>Sally Wright</td>
<td>Admin Clerk—processing of permit, keeper of Administrative Record</td>
</tr>
<tr>
<td>Sandy Pusey</td>
<td>Chief, Administration</td>
</tr>
</tbody>
</table>
# Budget Summary

<table>
<thead>
<tr>
<th>Staff</th>
<th>Dates Needed</th>
<th>Grade</th>
<th>Cost per hour (incl. benefits)</th>
<th>Time Needed</th>
<th>Total Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Health Officer (incl. travel &amp; per diem)</td>
<td>10/5</td>
<td>0-6 Officer</td>
<td>$60</td>
<td>6 AM - 4 PM</td>
<td>$600</td>
</tr>
<tr>
<td>Park Safety Officer (monitor set-up, OT)</td>
<td>10/5</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>5 AM - noon</td>
<td>$247</td>
</tr>
<tr>
<td>Park Ranger (interpretation, straight time)</td>
<td>10/5</td>
<td>GS-9/3</td>
<td>$25.57 x 30% $33.24</td>
<td>10 AM - 4 PM</td>
<td>$200</td>
</tr>
<tr>
<td>Maintenance Mechanic (monitor set-up)</td>
<td>10/5</td>
<td>WG-9/3</td>
<td>$25.18 x 1.5 x 1.45% $38.32</td>
<td>5 AM - 10 AM</td>
<td>$192</td>
</tr>
<tr>
<td>Park Ranger (monitor set-up OT)</td>
<td>10/5</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>5 AM - 10 AM</td>
<td>$177</td>
</tr>
<tr>
<td>Park Ranger (traffic OT)</td>
<td>10/5</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>6 AM - 6 PM</td>
<td>$424</td>
</tr>
<tr>
<td>Park Ranger (traffic OT)</td>
<td>10/5</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>6 AM - 6 PM</td>
<td>$424</td>
</tr>
<tr>
<td>Public Health Officer (incl. travel &amp; per diem)</td>
<td>10/6</td>
<td>0-6 Officer</td>
<td>$60</td>
<td>6 AM - 4 PM</td>
<td>$600</td>
</tr>
<tr>
<td>Park Safety Officer (monitor tear-down OT)</td>
<td>10/6</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>4 PM - 8 PM</td>
<td>$141</td>
</tr>
<tr>
<td>Park Ranger (monitor tear-down OT)</td>
<td>10/6</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>4 PM - 8 PM</td>
<td>$141</td>
</tr>
<tr>
<td>Maintenance Mechanic (monitor tear-down)</td>
<td>10/6</td>
<td>WG-9/3</td>
<td>$25.18 x 1.5 x 1.45% $38.32</td>
<td>4 PM - 8 PM</td>
<td>$153</td>
</tr>
<tr>
<td>Park Ranger (interpretation, straight time)</td>
<td>10/6</td>
<td>GS-9/3</td>
<td>$25.57 x 30% $33.24</td>
<td>10 AM - 4 PM</td>
<td>$200</td>
</tr>
<tr>
<td>Park Ranger (traffic OT)</td>
<td>10/6</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>6 AM - 8 PM</td>
<td>$494</td>
</tr>
<tr>
<td>Park Ranger (traffic OT)</td>
<td>10/6</td>
<td>GS-9/3</td>
<td>$34.73 x 1.45% $35.23</td>
<td>6 AM - 8 PM</td>
<td>$494</td>
</tr>
<tr>
<td>Park Ranger</td>
<td>10/7</td>
<td>GS-9/3</td>
<td>$25.57 x 30% $33.24</td>
<td>2 hours TBD</td>
<td>$66</td>
</tr>
</tbody>
</table>

## Travel Estimate

<table>
<thead>
<tr>
<th>Public Health Officer</th>
<th>Per diem 4 days</th>
<th>Lodging – $84 Per diem – $56 Total/day – $140</th>
<th>$560</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>.55/mile</td>
<td>800 miles roundtrip</td>
<td>$440</td>
</tr>
<tr>
<td>Permit Application</td>
<td></td>
<td></td>
<td>$80</td>
</tr>
</tbody>
</table>

**TOTAL ESTIMATE** $5,633
Schedule Summary
The scheduling of Sphagnum Historical Society’s Salmon Festival relies on a number of cooperative relationships. This schedule summarizes major milestones only and the individual on the Sphagnum Historical Society’s Salmon Festival team that is responsible for the completion of the milestone.

<table>
<thead>
<tr>
<th>WBS</th>
<th>Activity</th>
<th>Responsible</th>
<th>Projected Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Project Initiation</td>
<td>McCormick</td>
<td>3/31</td>
</tr>
<tr>
<td></td>
<td>- Permit Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- SEOT Park Management Meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.0</td>
<td>Analysis of Permit Request</td>
<td>McCormick</td>
<td>4/30</td>
</tr>
<tr>
<td>3.0</td>
<td>Approval of Permit</td>
<td>Wolter</td>
<td>5/15</td>
</tr>
<tr>
<td>4.0</td>
<td>Development</td>
<td>McCormick</td>
<td>9/1</td>
</tr>
<tr>
<td></td>
<td>- Schedule Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Document Meetings and Follow up permits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.0</td>
<td>Festival</td>
<td>McCormick</td>
<td>10/5-10/6</td>
</tr>
<tr>
<td>6.0</td>
<td>Evaluation-After Action</td>
<td>McCormick</td>
<td>10/31</td>
</tr>
</tbody>
</table>

Dependencies
Developing the Sphagnum Historical Society’s Salmon Festival is dependent upon cooperation and collaboration from various entities. This section lists the dependencies for the project. Dependencies are items the project team requires to continue its work but that are being completed by resources outside of the project team.

Dependencies:
- Availability of Public Health Officer
- Compliance of Vendors and Food Service Providers
- Visitor compliance
Project Risks

Project risks identified to date are provided below with an assessment and recommended response.

<table>
<thead>
<tr>
<th>No.</th>
<th>Risk Event Statement</th>
<th>Probability</th>
<th>Impact</th>
<th>Recommended Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The permittee is required to provide 9 Porta-Johns with hand washing stations. If the crowd is much larger than expected, this may be insufficient.</td>
<td>M</td>
<td>M</td>
<td>Ensure the permittee has made arrangements for periodic cleaning and re-stocking.</td>
</tr>
<tr>
<td>2</td>
<td>Activity is taking place in an historic archaeological site, and heavy booths may damage the resource.</td>
<td>H</td>
<td>H</td>
<td>Have the park archaeologist survey the area and approve the vendor booth layout. No tent stakes may be used.</td>
</tr>
<tr>
<td>3</td>
<td>Inclement weather may affect festival plans.</td>
<td>L</td>
<td>H</td>
<td>Festival to be canceled 24 hours in advance of start if weather forecast is for sustained high winds and/or heavy rain.</td>
</tr>
<tr>
<td>4</td>
<td>Apple Butter maker requires a fire, and this could pose a safety issue.</td>
<td>L</td>
<td>M</td>
<td>Approve a fire pit. Stipulate in conditions that approval for fire may be canceled if wildland fire conditions are high.</td>
</tr>
<tr>
<td>5</td>
<td>Excessive trash could impact the resource.</td>
<td>H</td>
<td>H</td>
<td>Permittee needs to pick up trash on a regular basis and remove it from the site at the end of the day. Stress to permittee (through a permit condition) that the site must be kept clean of trash and sanitary facilities cleaned and stocked.</td>
</tr>
</tbody>
</table>

Project Issues

Project issues identified to date are provided below with a recommended response.

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Priority</th>
<th>Recommended Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Coho Fishing Camp has no parking on site, so visitors will have to walk on the road.</td>
<td>H</td>
<td>Parking at Rocky Point or East Campground. Visitors walk to the festival site. Create walking path on road (maybe use traffic cones). May need staff to help with traffic congestion in parking areas. Consider asking festival organizers to arrange a shuttle from the visitor center parking lot.</td>
</tr>
<tr>
<td>No.</td>
<td>Description</td>
<td>Priority</td>
<td>Recommended Action</td>
</tr>
<tr>
<td>-----</td>
<td>------------------------------------------------------------------------------</td>
<td>----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>2</td>
<td>No potable water is available at the Coho Fishing Camp.</td>
<td>H</td>
<td>Vendors will need to bring necessary water. Hand-washing stations have water reservoirs.</td>
</tr>
<tr>
<td>3</td>
<td>Vendors want to leave set-up in place overnight.</td>
<td>M</td>
<td>Evaluate whether overnight theft is a concern. Require everything to be removed at the end of the first day, offer periodic patrol by park ranger, or require permittee to provide overnight security by unarmed security company or guard.</td>
</tr>
</tbody>
</table>

**Author(s)**

This document was prepared by and for:

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Superintendent  
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541-555-9871  
Stephen_Wolter@nps.gov

**Approvals**

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Version</th>
<th>Approver Name and Title</th>
<th>Approver Signature (if required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/15</td>
<td>3.0</td>
<td>Stephen A. Wolter, Superintendent</td>
<td></td>
</tr>
</tbody>
</table>

**Version History**

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Version</th>
<th>Document Revision History</th>
<th>Document Author/Reviser</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/1</td>
<td>1.0</td>
<td>Initial draft</td>
<td>McCormick</td>
</tr>
<tr>
<td>3/5</td>
<td>2.0</td>
<td>Reviewed with Admin Officer for staff and budget numbers and revised</td>
<td>McCormick</td>
</tr>
<tr>
<td>3/20</td>
<td>3.0</td>
<td>Review with Superintendent and approval</td>
<td>McCormick</td>
</tr>
</tbody>
</table>
<Insert Project Name Here>

Project Plan

Project Summary

Start Date:  
End Date:  
Project Abstract:  <Short Summary of Project>

Purpose of Project Plan

<Recommended text>
This Project Plan describes what work the <Insert project name> Project Team—composed of representatives from <insert partner agency name and/or other partner entities>—will do, what results will be achieved, and how project work will be executed and managed. It describes team roles and responsibilities and deliverables. It identifies assumptions, constraints, dependencies, risks, and issues, and it provides high-level schedule and budget information.

Section Guidance

This section is easiest to write LAST, after all the details have been included

Background

Section Guidance

This section describes the problem or opportunity the project seeks to address and provides other relevant background information:

Examples:
- Change in legislation requires action.
- Current technology is outdated and not meeting needs.
- Service levels are low, resulting in frequent customer complaints.
- Demand for products or services are changing.
Tip

Be concise and try to keep this section to half a page or less. Focus on information relevant to the project rather than providing a lot of background information on the organization undertaking the project.

Goal and Objectives

<Recommended text>

The overall goal of this project is <insert text from proposal and/or task agreement>

The objectives for the <insert project name> are:
- <Insert specific objectives here>

Section Guidance

This section lists one project goal and the project objectives. The project goal is a clear, concise statement of the project’s purpose and desired results. Project objectives are concise statements of what the project must achieve to realize the project goal. Objectives can be thought of as “sub-goals.”

Example:

The goal of this project is to reduce traffic accidents. This goal will be achieved if the following three objectives are achieved:

1. Increase public awareness and knowledge of how to drive safely.
2. Pass new, stricter laws for speeding and seatbelt violations.
3. Assign more police to enforce new, stricter laws.

Tip

Be consistent with the “Project Goal” and “Project Objectives” sections of any agreements or proposals... Again, be concise. Goal statements and objectives are typically each one sentence long.
Scope

<Recommended text>

This section summarizes the scope of the proposed project by providing a list of key activities and deliverables. In the table below, list (i) the activities the team will do and (ii) the activities the team will not do but that a reader might mistakenly believe the team is doing.

The scope of this project is outlined in the table below.

<table>
<thead>
<tr>
<th>In Scope</th>
<th>Out of Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section Guidance

This section summarizes the scope of the proposed project by providing a list of key activities and deliverables. In the table provided in this section of the template, list (i) the activities the team will do and (ii) the activities the team will not do but that a reader might mistakenly believe the team is doing. For example, configuring new software may be in scope for the project team, but training staff on new software may be out of scope because the vendor is providing this service.
Assumptions and Constraints

An assumption is a circumstance or event outside the project that can affect its success and that the authors of this plan believe will happen. Constraints are restrictions or boundaries placed upon the project that limit the choices of the project team. The assumptions and constraints for this project are listed in the table below.

<table>
<thead>
<tr>
<th>Assumptions</th>
<th>Constraints</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section Guidance
List the project assumptions and constraints in the table provided in the template.

Example assumptions:
- The Sponsor will be available for weekly status meetings and approvals.
- Contractors with the appropriate levels of skill and experience will be available to support delivery.

Example constraints:
- The project must be completed in four months.
- The final deliverables must adhere to international standards of performance and safety.
- The Project Manager will use the Project Management Lifecycle Framework.
Stakeholders

*Recommended text*
The table below lists stakeholders and indicates how they will be impacted and engaged by the project.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Impact</th>
<th>Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Section Guidance**

This section lists project stakeholders, or people with an interest in or influence over project work and results. This section also indicates how stakeholders will be impacted and engaged by the project.

Examples of key stakeholders are as follows:
- **Decision-makers**: People with authority and decision-making power over the project.
- **Influencers**: People who influence and advise decision-makers.
- **End users**: People who will use the end product of the project.

**Tips:**
- Answer the three questions/discussion points for stakeholders
  - Collaborative roles with stakeholders include stakeholders being members on a squad or management committee, participating on the project team, or approving one or more deliverables.
  - Consultative roles for stakeholders include membership on an Advisory Committee or participation in focus groups or working groups.

In the left-hand column of the table, it is typical to provide the individual title for senior executives and the name of a group of staff or unit for employees. This section lists project stakeholders, or people with an interest in or influence over project work and results. This section also indicates how stakeholders will be impacted by the project and how they will be engaged.
Deliverables

<Recommended text>
The project is completed when the deliverables listed in the following table are completed.

<table>
<thead>
<tr>
<th>Deliverable Name</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section Guidance

In the table provided in the template, list each deliverable name with a brief description. This will provide a shared understanding of what is being produced by the team. Deliverables are tangible items that must be produced to complete the project. These can include generic project management deliverables—such as weekly or monthly status reports—as well as items specific to the project. It is best to ensure this section is consistent with any agreements, proposals or other documents.

Example section:
- The project is completed when the deliverables listed in the following table are completed.

Outcomes/Success

<Recommended text>
The <Insert project name> project is a complex multi-phased project that has multiple objectives as well as stakeholders. The measure of success of the <Insert project name> is based on the <Insert general outcomes here>. Specific outcome and success measures for the <Insert project name>:
- <Insert specific outcome measures here in bullet form>
Section Guidance

Provide a list of statements about the impact the project must have on those outside the project to be considered successful and how those impacts will be measured.

Examples:

The project will be considered successful if the following statements are true:

- The number of traffic accidents is reduced—as indicated by statistics from MOI.
- Program costs are reduced—as indicated by actual costs accrued at the end of this fiscal year compared to actual costs accrued over the past five fiscal years.
- There are higher levels of customer satisfaction—as indicated in a customer satisfaction survey.

*Note the following regarding outcomes and success measures:

- Outcome statements must be consistent with the project goal.
- Be sure that data can be gathered relatively easily to demonstrate the achievement of an outcome.
- Be sure to clarify in the Scope section of this document if an evaluation of the project is to be carried out, either as part of the project’s scope or by another team at a later date.

Budget Summary
<Recommended text>

Human Resources
<Recommended text>

Roles and Responsibilities

The following human resources are required for the project.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Section Guidance

This section contains the results of human resource planning activities completed to support this project. This section describes the roles and responsibilities of the project team, provides start and finish dates, and provides an organizational chart for the project.

<table>
<thead>
<tr>
<th>Example:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Owners—WASO and Regional PAMP Coordinator</strong></td>
</tr>
<tr>
<td>o Oversees PAMP revision and implementation for the park unit and reviews progress at milestones</td>
</tr>
<tr>
<td>o Clears project road blocks such as negotiating with park units on timing/deadlines, securing resources, and assisting with strategic issues and risks</td>
</tr>
<tr>
<td>o Chairs the WASO PAMP Implementation or the Regional PAMP Implementation team</td>
</tr>
<tr>
<td><strong>Project Manager</strong></td>
</tr>
<tr>
<td>o Oversees day-to-day execution of PAMP revision and/or implementation for various park units as assigned</td>
</tr>
<tr>
<td>o Maintains Project Plan, Schedule, and Budget Reports status</td>
</tr>
<tr>
<td>o Executes PM processes for risks, issues, change control, and document management</td>
</tr>
<tr>
<td>o Maintains project records and deliverable archives</td>
</tr>
<tr>
<td>o Recruits and trains team members and manages performance</td>
</tr>
<tr>
<td>o Chairs regularly scheduled team status meeting</td>
</tr>
<tr>
<td><strong>PAMP Park Unit Lead</strong></td>
</tr>
<tr>
<td>o Provides project management and admin support to Project Manager</td>
</tr>
<tr>
<td>o Conducts training and communications</td>
</tr>
<tr>
<td>o Tracks deliverables and maintains project archives</td>
</tr>
<tr>
<td>o Updates Project Plan, Schedule, and Budget Processes expenses</td>
</tr>
<tr>
<td>o Guides park unit through phases of PAMP revision and/or implementation per schedule</td>
</tr>
<tr>
<td>o Ensures quality control is accomplished</td>
</tr>
</tbody>
</table>
Schedule Summary

Recommended text: Suggest milestones only to the tenth level and add only names and dates to each milestone to keep schedule at the summary or high level

The scheduling of <Insert project name> relies on a number of cooperative relationships. This schedule summarizes major milestones only and the individual on the <Insert project name> team that is responsible for the completion of the milestone.

<table>
<thead>
<tr>
<th>WBS</th>
<th>Activity</th>
<th>Responsible</th>
<th>Projected Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section Guidance

This section lists project milestones and their dates. Milestones are significant dates in a project that typically mark the end of a phase, the completion of a major deliverable, or a major project decision. Milestones are generally used as checkpoints during the project to gauge status and are often used to get approval to continue to the next stage of work.

Example: This project has six milestones. The project team leader will meet (in person or virtually) with the partner agency key official at each milestone to review progress and obtain approvals and decisions as required. If greater detail is needed, provide the next hierarchy of milestones and deliverables as planned for the project.

1. Design complete: October 30, 2013
2. Vendor selected: November 30, 2013
3. Build complete: January 30, 2014
5. Implementation Plan complete: March 15, 2014
6. Implementation complete: June 30, 2014
Dependencies

<Recommended text>

Developing the <Insert project name> is dependent upon cooperation and collaboration from various entities. This section lists the dependencies for the project. Dependencies are items the project team requires to continue its work but that are being completed by resources outside of the project team.

Section Guidance

This section lists the inbound and outbound external dependencies for the project. Dependencies are items the project team requires to continue its work but that are being completed by resources outside of the project team.

Example Dependencies

- Data from FMSS
- Updated PAMP Implementation guide and schedule
- Updated training materials and plan from NPS FMP via Eppley Institute for Parks and Public Lands

Dependencies

- <Insert dependencies here in bullet form>

Project Risks

<Recommended text:>

Project risks identified to date are provided below with an assessment and recommended response.

<table>
<thead>
<tr>
<th>No</th>
<th>Risk Event Statement</th>
<th>Probability H/M/L</th>
<th>Impact H/M/L</th>
<th>Recommended Response</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section Guidance

In this section, list the project risks identified to date, along with their estimated probability and impact and recommended response.

A risk is something that may or may not occur in the future and that can have an impact on the success of the project. "Probability" means the likelihood that a risk will occur and is expressed as High, Medium, or Low. "Impact" describes how seriously the risk could affect the project and is also expressed as High, Medium, or Low.

Tip:

Include the risks identified in agreements, proposals or from the preliminary discussions with partner agency personnel. Use concrete definitions of terms like “High,” “Medium,” and “Low.” These definitions are called “risk tolerances.” A good risk event statement includes what might happen and its effect on a project. For example, "weather" is not a risk event statement. "Bad weather may delay project completion" is an example of a good risk event statement.

Project Issues

<Recommended text>

Project issues identified to date are provided below with a recommended response.

<table>
<thead>
<tr>
<th>No</th>
<th>Description</th>
<th>Priority H/M/L</th>
<th>Recommended Action</th>
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<td>1</td>
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</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section Guidance

This section lists project issues identified to date and provides a recommended response to the issues. Issues are things that are currently happening and have a negative impact on the project. In the table provided in the template, list any issues that may have been identified while writing the Project Plan, and include recommended actions to resolve issues.

Tips:

Only include things that are currently happening or have a 100% chance of occurring in the future.
Author(s)

This document was prepared by and for: <Insert contact information for each author as follows:>
Xxxxxxx Xxxxxxxx, Team Members
<Insert project name>

<Example Name>
Key Official
Park Name
Address
City, State Zip
Office Phone: xxx-xxxx
name@domain

Approvals

<table>
<thead>
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<th>Date</th>
<th>Document Version</th>
<th>Approver Name and Title</th>
<th>Approver Signature (if required)</th>
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</thead>
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Version History

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<td>October 31, 2013</td>
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<td></td>
<td>Jane Devonshire</td>
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</table>
CONDITION ASSESSMENTS

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

- Apply Condition Assessment practices to Annual Work Plan.
- Apply Condition Assessment practices to Project Planning
AWP GROUP ANALYSIS & CONSENSUS

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.
FACILITY PROJECT DEVELOPMENT AND FUND SOURCES

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.
PMIS Project Writing Tips

**Good Descriptions Answer These Questions:**
- What do you need?
- When do you need it (special projects or events, visitor increases)?
- Where do you need it?
- Who will be doing the project?
- How many do you need?

**Justifications should:**
- Address WHY you need it.
- Be specific and deal in facts.
- Refer to specific standards (EPA, OSHA, etc.) that apply to or affect your request.
- Be brief.
- State how your request will affect the visitor.
- State how your request will affect the resource.
- State how your request will affect management objectives.
- State consequences that will occur if you don’t get it.
- Indicate how the resource would deteriorate, if applicable.

**Measurable Results:**
- Addresses the overall benefit of the project if accomplished (quantifiable, how it impacts the visitor).
BUDGETING AT YOUR PARK

Review OBJECTIVES from Understanding the Federal Budget Process (ADM1025)eCourse:
At the end of this session, students should be able to
- Arrange the major steps of the federal budget cycle
- Describe the roles of the key players in the budget process
- Explain how the budget process involves three separate fiscal year budgets simultaneously.
- Explain difference between mandatory versus discretionary funding

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.
The Simplified Budget Cycle

Steps 1 – 5: Requesting the Money (1- Park; 2- Region; 3- WASO; 4- DOI; 5- OMB)
Steps 6 - 7: Receiving the Money (6- President; 7- Congress)
Steps 8 - 10: Distributing the Money (8- DOI; 9 –WASO; 10 – Region)
Key Players in the Budget Process

Park/Office
- Superintendents
- Division Chiefs

Regional Office/Directorate
- Regional Director
- Associate Regional Directors
- Budget Officer

WASO
- Director
- Deputy Director
- Associate Directors
- Comptroller
- Budget Officer

Department of the Interior (DOI)
- Secretary of the Interior
- Assistant Secretary for Fish and Wildlife and Parks
- Assistant Secretary, Policy, Budget and Administration
- DOI Budget Officer

Office of Management & Budget (OMB)
- OMB Examiner

Congress
House:
- Sub-Committee Chair
- Majority Staff Director
Senate:
- Sub-Committee Chair
- Majority Clerk

(Use bold letters in left column to fill in these blanks)

- Identify additional resources needed to operate and maintain the park
- Review NPS and FWS request
- Review DOI Budget estimates
- Set park priorities
- Monitor and evaluate spending
- Set regional priorities
- Pass an appropriations bill that is sent to the President for signature
- Determine what will be submitted to OMB
- Determine what will be submitted to DOI
- Account for expenditures
- Review park requests
- Determine what will be in the appropriation
- Add requests for Service wide programs
- Hold hearings
- Review regional requests
- Add requests for region wide programs
## 2016 Advance Facility Management Practices

### Budget

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SCC to update PMIS and OFS</td>
<td></td>
<td></td>
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<td>Regional Review and Priority Banding</td>
<td>GPRA Update (PMDS)</td>
<td>DOI Budget Guidance</td>
<td>Review &amp; Analysis of OFS</td>
<td>NLC Priority Setting Session</td>
<td>Budget Submission to DOI</td>
<td>DOI Passback</td>
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</tbody>
</table>

### FY 2018

|         | OMB Hearings | OMB Passback | Appeals to Passback | Prepar a -tion of Greenbook | Call for Briefing Statements | Submission of Greenbook | Appropriation Subcommittee Hearings (Congress) | Questions for the Record | Congressional Budget Resolution | Allocations to Sub-committees | Capability Statements | Markup of Appropriations Bill and votes by Congress | Effects Statements | Conference Committee Passage by Congress |

### FY 2017

|         | President signs Interior Appropriation Bill | Treasury Warrants | Allocation Adjustment (Exhibit B) | Regional Allocations Funding Advice | Program Execution begins |     |     |     |     |     |     |     | Close Accounts |

---

Parks Execute Budget
<table>
<thead>
<tr>
<th>Appropriation</th>
<th>Activity</th>
<th>Subactivity</th>
<th>Program Component</th>
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<tr>
<td><strong>Discretionary Appropriations</strong></td>
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<td>Operation of the National Park</td>
<td>Park Management</td>
<td>Resource Stewardship</td>
<td>Natural Resource Stewardship</td>
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<tr>
<td>System (ONPS)</td>
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<td>Visitor Services</td>
<td>Cultural Resource Stewardship</td>
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<td></td>
<td></td>
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<td>Interpretation and Education</td>
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<td>Commercial Services</td>
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<td>Park Protection</td>
<td>Law Enforcement and Protection</td>
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<td></td>
<td></td>
<td></td>
<td>United States Park Police Operations</td>
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<td></td>
<td></td>
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<td>Public Health and Safety</td>
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<td>Facility Operations and Maintenance</td>
<td>Operations and Maintenance of Buildings, Facilities and Lands</td>
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<td>Park Support</td>
<td>Management, supervision and administrative operations for park areas, service-wide</td>
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<td>programs and partnerships</td>
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<td>External Administrative costs</td>
<td>Employee Compensation Programs</td>
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<td>Centralized Information</td>
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<td>Technology Costs</td>
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<td>Telecommunications</td>
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<td>GSA Space Rental</td>
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<td>funding to match funds</td>
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<td>for NPS projects and</td>
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<td>programs targeted to</td>
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<td>enhance visitor services</td>
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<td>and improve natural and</td>
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<td>National Recreation and</td>
<td>Recreation Programs</td>
<td>Recreation Programs</td>
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<td>Natural Programs</td>
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<td></td>
<td>Rivers, Trails and Conservation Assistance</td>
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<td>Chesapeake Bay Gateways and Trails</td>
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<td>National Natural Landmarks</td>
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<td>Hydropower Recreation Assistance</td>
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<tr>
<td>Appropriation</td>
<td>Activity</td>
<td>Subactivity</td>
<td>Program Component</td>
</tr>
<tr>
<td>---------------</td>
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</tbody>
</table>
| National Recreation and Preservation (NR&P) (Continued) | Cultural Programs | | National Register Programs  
Technology & Training  
Graves Protection & Repatriation Act (NAGPRA) Grants  
Japanese American Confinement Site Grants |
| | Environmental Compliance and Review | | Environmental Compliance and Review |
| | Grants Administration | | Historic Preservation Fund Administration  
Native American Graves Protection Grants Administration |
| | International Park Affairs | | Office of International Affairs; Southwest Border Resource Protection Program Region |
| | Heritage Partnership Programs | | Administrative Support  
Preserve America Grants |
| Historic Preservation Fund | Grants-in-Aid | | Grants-in-Aid to States and Territories  
Grants-in-Aid to Tribes  
Grants-in-Aid to Historically Black Colleges and Universities |
<table>
<thead>
<tr>
<th>Appropriation</th>
<th>Activity</th>
<th>Subactivity</th>
<th>Program Component</th>
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<tbody>
<tr>
<td>Construction</td>
<td>Line-Item Construction</td>
<td>Special Programs</td>
<td>Emergencies and Unscheduled Projects, Housing Improvement Program, Dam Safety and Security Program, Equipment Replacement Program</td>
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<tr>
<td>Construction Planning</td>
<td>Construction Planning Program</td>
<td>Construction Program Management and Operations</td>
<td>Associate Director, Planning, Facilities and Lands Denver Service Center Operations Harpers Ferry Center Operations Regional Facility Project Support</td>
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<td>Management Planning</td>
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<td>Unit Management Plans, Strategic Planning, Special Resource Studies, Environmental Impact Planning and Compliance (EIS)</td>
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<td>Land Acquisition and State Assistance</td>
<td>Federal Land Acquisition State Conservation Grants</td>
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<tr>
<td>Appropriation</td>
<td>Activity</td>
<td>Subactivity</td>
<td>Program Component</td>
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<tr>
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<tr>
<td><strong>Mandatory Appropriations</strong></td>
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<td>Recreation Fee</td>
<td>Recreation Fee Program</td>
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<td>Permanent Appropriations</td>
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<td>Transportation Systems Fund</td>
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<td>Other Permanent Appropriations</td>
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<td>Appropriations</td>
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<tr>
<td>Miscellaneous Trust Funds</td>
<td>Miscellaneous Trust Funds</td>
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<td></td>
<td></td>
<td>Donations (General)</td>
<td></td>
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<td></td>
<td>Preservation, Birthplace of Abraham Lincoln</td>
<td></td>
</tr>
<tr>
<td>Centennial Initiative-</td>
<td></td>
<td>Centennial Challenge</td>
<td></td>
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<td>Centennial Challenge</td>
<td></td>
<td></td>
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<tr>
<td>Urban Park Recreation and</td>
<td>Urban Park Recreation and Recovery</td>
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</tr>
<tr>
<td>Recovery</td>
<td>Grants</td>
<td>Aid to distressed urban areas</td>
<td></td>
</tr>
</tbody>
</table>
**Financial and Business Management System (FBMS)**

**Fact Sheet – Master Data**

---

**Keys to Success**

Our new master data consists of more characters and looks different. It will take some time to get used to the new formats and terms.

To help users through the deployment period, the NPS FBMS Implementation Team will create and distribute crosswalks of our current master data to FBMS master data, and decision trees (which master data to use and when).

**Master Data entry TODAY:**

Always enter:
- Org Code
- PWE
- BOC (Budget Object Code) for Acquisition

Sometimes enter:
- Job #

**Master Data entry in FBMS:**

Always choose between one of the following cost objects:
- Cost center + Functional Area + Fiscal year(s)
- WBS
- Work Order

---

**Master Data Overview**

The term "master data" refers to the data elements that reflect the NPS's organization structure and budget structure.

**Terminology**

Current NPS systems rely on a number of master data elements. These elements exist in FBMS within new structures (new master data elements). The table below crosswalks the current NPS master data elements to the new FBMS master data elements.

<table>
<thead>
<tr>
<th>Current Term</th>
<th>FBMS Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund</td>
<td>Fund</td>
<td>How we track our budget, and where the money is coming from</td>
</tr>
<tr>
<td>N/A</td>
<td>Fund Type</td>
<td>What type of budget authority governs the money</td>
</tr>
<tr>
<td>Org Code</td>
<td>Funds Center/ Cost Center</td>
<td>Who is spending the money</td>
</tr>
<tr>
<td>Budget Object Code (BOC)</td>
<td>General Ledger (GL) Account/Commitment Item</td>
<td>What the money (revenue or expenditure) is being spent on or collected for</td>
</tr>
<tr>
<td>Sub-activity/Primary Work Element (PWE)</td>
<td>Functional Area</td>
<td>What type of program/activity the money is associated with; includes Activity Based Costing (ABC) code</td>
</tr>
<tr>
<td>Job Number</td>
<td>Work Breakdown Structure (WBS)/Funded Program</td>
<td>Which project, event, or reimbursable agreement the money is associated with</td>
</tr>
<tr>
<td>N/A</td>
<td>Work Order</td>
<td>Which Real Property or Fleet item is being maintained</td>
</tr>
</tbody>
</table>

---

**Chargeable/Cost Objects**

The term 'chargeable/cost' object refers to the required master data elements users must enter for FBMS to correctly create/change financial documents. Decision Tree diagrams are created by the FBMS team to assist NPS users in choosing the correct cost object for their transaction.

**Derivation**

'Derivation' allows FBMS to use chargeable/cost objects to derive other master data elements (e.g., Fund year(s) + Functional Area together derive the full 'Fund')

---

**Resource Corner**

John Spernoga  
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John_Spernoga@nps.gov

Melinda Dominguez  
NPS FBMS Master Data Lead  
Melinda_Dominguez@nps.gov

http://share.nps.gov/FBMS
The table below presents the formats for FBMS master data elements.

### Fund

- **22103601**
  - Fund Beginning Fiscal Year
  - Fund Ending Fiscal Year
  - Bureau Indicator P = NPS
  - Treasury Symbol
  - NPS code for Fund

### Cost Center / Funds Center

- **PPNCANTIO00**
  - Bureau Indicator P = NPS
  - Reserved for Future Use
  - Region or WASO
  - Park/Unit or Region/WASO Office
  - Alpha-numeric or numeric at office/unit's discretion; OR, 2-char alpha state code for state-related grants

### Functional Area

- **PPMOMFO1ZAB0000**
  - Bureau Indicator P = NPS
  - Budget Activity
  - Budget Sub-Activity
  - Program Element
  - Sub-Program Element
  - 1- or 2-Character ABC Code (followed by zeros fill)

### Work Breakdown Structure / Funded Program

- **PNNP0159578A011**
  - Bureau Indicator P = NPS
  - FBMS Project Type
  - NPS Specific Type
  - NPS Unique Identifier
  - Funding Component (if applicable)
  - Facility or Asset (if applicable)

### Cost Center/Funds Center Regions / WASO

<table>
<thead>
<tr>
<th>Region</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AK</td>
<td>Alaska</td>
</tr>
<tr>
<td>IM</td>
<td>Intermountain</td>
</tr>
<tr>
<td>MW</td>
<td>Midwest</td>
</tr>
<tr>
<td>NC</td>
<td>National Capital</td>
</tr>
<tr>
<td>NE</td>
<td>Northeast</td>
</tr>
<tr>
<td>PW</td>
<td>Pacific West</td>
</tr>
<tr>
<td>SE</td>
<td>Southeast</td>
</tr>
<tr>
<td>WO</td>
<td>WASO</td>
</tr>
</tbody>
</table>

### Functional Area Budget Activity Examples

**ONPS**

- **PM** Park Management
- **EA** External Administrative Costs

**National Recreation & Preservation**

- **RE** Recreation Programs
- **NA** Natural Programs
- **CU** Cultural Programs
- **EN** Environmental Compliance & Review
- **GR** Grants Administration

**Constructions & Major Maintenance (CONST)**

- **LC** Line Item Construction
- **CP** Construction Planning
- **SP** Special Programs

### Functional Area Budget Sub-Activity Examples

**ONPS – Park Management (PM)**

- **RS** Resource Stewardship
- **VS** Visitor Services
- **PR** Park Protection

**OM** Facility Operations & Maintenance

- **PS** Park Support

**CONST – Special Programs (SP)**

- **ER** Equipment Replacement Program
- **HI** Housing Improvement Program

---

FBMS Fact Sheet – Master Data

2 of 2

Last Updated: September 2012
## FBMS ACCOUNT Examples by Asset Type: Worksheet

<table>
<thead>
<tr>
<th>Asset Type</th>
<th>Operations FBMS ACCOUNT</th>
<th>Examples</th>
<th>Maintenance FBMS ACCOUNT</th>
<th>Examples</th>
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</thead>
<tbody>
<tr>
<td>Buildings</td>
<td></td>
<td>• Activating/de-activating seasonal buildings</td>
<td></td>
<td>• Painting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Routine cleaning and custodial work.</td>
<td></td>
<td>• Plumbing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Solid waste collection and disposal.</td>
<td></td>
<td>• Roofing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Termite inspections</td>
<td></td>
<td>• Structural repairs</td>
</tr>
<tr>
<td>Grounds</td>
<td></td>
<td>• Litter collection and trash removal.</td>
<td></td>
<td>• Floor refinishing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Lawn irrigation, mowing, edging, and trimming.</td>
<td></td>
<td>• Equipment/feature repair or replacement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Leaf collection and removal.</td>
<td></td>
<td>• Masonry work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Pest management. Herbicide application.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cleaning statuary and monuments.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Opening and closing campgrounds.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marine and Waterways</td>
<td></td>
<td>• Servicing of marine toilet facilities.</td>
<td></td>
<td>• Servicing and repairing irrigation systems.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Operating marine fuel stations.</td>
<td></td>
<td>• Painting and repairing outdoor fixtures and furnishings, such as</td>
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<tr>
<td></td>
<td></td>
<td>• Operating transport craft.</td>
<td></td>
<td>• benches, tables, and trash cans.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Water transport of waste material.</td>
<td></td>
<td>• Repairing walls and fences.</td>
</tr>
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<td></td>
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<td></td>
<td></td>
<td>• Tree health maintenance.</td>
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</tbody>
</table>


<table>
<thead>
<tr>
<th>Asset Type</th>
<th>Operations FBMS ACCOUNT</th>
<th>Examples</th>
<th>Maintenance FBMS ACCOUNT</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roads, Bridges, and Parking Areas</td>
<td></td>
<td>• Roadside litter collection and trash removal.</td>
<td></td>
<td>• Clearing vegetation from the roadsides.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Roadside mowing and trimming.</td>
<td></td>
<td>• Cleaning ditches and culverts.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Rock fall/slide removal.</td>
<td></td>
<td>• Grading roads.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Road sweeping.</td>
<td></td>
<td>• Asphalt overlays, patching potholes, filling cracks, and striping.</td>
</tr>
<tr>
<td>Trails and Trail Bridges</td>
<td></td>
<td>• Litter collection and trash removal.</td>
<td></td>
<td>• Sign repair and replacement.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Activating/de-activating seasonal trails.</td>
<td></td>
<td>• Painting bridges.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hazardous tree removal.</td>
<td></td>
<td>• Grading, hauling, and stockpiling materials.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Stock and packing operations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilities (Electrical, Water, Wastewater, Phone, Radio, and LAN (IT) Systems)</td>
<td></td>
<td>• Utility bill payments.</td>
<td></td>
<td>• Drainage and tread repair.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Inspecting and adjusting utility system components.</td>
<td></td>
<td>• Replacing and repainting signs.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Operating and testing water and wastewater systems.</td>
<td></td>
<td>• Repairing boardwalks and foot bridges.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cost associated with utilities produced by public companies. (Water bills, etc.)</td>
<td></td>
<td>• Repairing and constructing rock and log retaining walls.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Septic tank pump-outs.</td>
<td></td>
<td>• Installing interpretive signage.</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Removal of vegetation along trail sides.</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Repair and replacement of water/wastewater components such as pumps, motors, valves, and piping systems.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Repair and replacement of electrical system components such as generators, distribution lines, and devices.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Repair and replacement of radio, telephone, and LAN (IT) system components.</td>
</tr>
<tr>
<td>Asset Type</td>
<td>Operations FBMS ACCOUNT</td>
<td>Examples</td>
<td>Maintenance FBMS ACCOUNT</td>
<td>Examples</td>
</tr>
<tr>
<td>------------------------------------------------</td>
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<td>--------------------------------------------------------------------------</td>
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<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Support and Miscellaneous</td>
<td></td>
<td>Fleet lease costs.</td>
<td></td>
<td>Repairing Tractors, Vehicle Maintenance Vehicle.</td>
</tr>
<tr>
<td>Program Administration and Support</td>
<td></td>
<td>Catch-all for any operations-related admin and indirect cost (e.g., admin duties, leave, meetings, training, etc.).</td>
<td></td>
<td>Include any indirect maintenance cost such as repairing equipment.</td>
</tr>
<tr>
<td>Cultural Resources</td>
<td></td>
<td>No clear explanation exists as to whether this applies to cultural landscapes, historic buildings, or monuments (etc.).</td>
<td></td>
<td>Catch-all for any maintenance-related admin and indirect cost (e.g., project development, contract administration).</td>
</tr>
<tr>
<td>Quarters</td>
<td></td>
<td>Under normal circumstances, operations for a quarters unit should be covered under the 692 Account; if expenses exceed income, use this Account to record operations costs associated with Quarters.</td>
<td></td>
<td>Under normal circumstances, maintenance for a quarters unit should be covered under the 692 Account; if expenses exceed income, use this Account to record maintenance costs associated with Quarters.</td>
</tr>
<tr>
<td>Solid Waste Sanitation Systems</td>
<td></td>
<td>Fees paid to an outside entity for the collection and removal of waste. Construction dumpsters (not project-based).</td>
<td></td>
<td>Repairs to vault toilets.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Repairs to trash compactors.</td>
</tr>
</tbody>
</table>
Helpful Programming Tips

Permanent Personal Services

- Make sure you have correct grade and step for each employee. Remember to program within grade increases due during the year. Your personnel office can provide that information.
- Remember to set aside costs for promotions and upward mobility positions.
- Program for the correct number of hours. Are the first and last pay periods of the fiscal year full pay periods? OPM average number of work hours per year is 2087. Average number of annual productive work hours (work hours minus leave hours) is 1776.
- Remember that employees can be programmed in several different Accounts. Use your Park Program Requests.
- Program accurate benefit percentages (FERS employees can be as high as 50%). Check again every quarter, and especially right after Pay Period 03. Review AFS4 Personal Services Comparison reports for accurate benefit percentages.
- Include additional benefit costs for 6C retirement.
- If employee is Subject to Furlough, program for benefits while on furlough.
- Includes all Sunday, Night, Holiday, and Overtime work.

Seasonal Personal Services

- Make sure grade and step are correct in AFS4.
- Program for the correct number of hours.
- Program seasonal lump sum annual leave in the second pay period after they terminate, unless this would mean programming into the next Fiscal Year.
- If seasonal terminates at end of FY, lump sum will be accrued.
- Include all Sunday, Night, Holiday, and Overtime work.
- Seasonal benefit percent is 7.65% without elected health benefits.
- Seasonal benefit percent is 22% with elected health benefits.
# Key Players in the Budget Process

<table>
<thead>
<tr>
<th>Level</th>
<th>Key Players</th>
<th>Budget Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Park/Office</td>
<td>• Superintendents</td>
<td>• Identify additional resources needed to operate and maintain the park</td>
</tr>
<tr>
<td></td>
<td>• Division Chiefs</td>
<td>• Set park priorities</td>
</tr>
<tr>
<td>Regional Office/Directorate</td>
<td>• Regional Director</td>
<td>• Review the park requests</td>
</tr>
<tr>
<td></td>
<td>• Associate Regional Directors</td>
<td>• Add requests needed for regionwide programs and regional office staff</td>
</tr>
<tr>
<td></td>
<td>• Support Office Superintendent</td>
<td>• Set regional priorities</td>
</tr>
<tr>
<td></td>
<td>• Budget Officer</td>
<td></td>
</tr>
<tr>
<td>WASO</td>
<td>• Director</td>
<td>• Review regional requests</td>
</tr>
<tr>
<td></td>
<td>• Deputy Director</td>
<td>• Add requests for Servicewide programs and Washington Office staff</td>
</tr>
<tr>
<td></td>
<td>• Associate Directors</td>
<td>• Determine what will be submitted to the Department</td>
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<tr>
<td></td>
<td>• Comptroller</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Budget Officer</td>
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</tr>
<tr>
<td>Department of the Interior (DOI)</td>
<td>• Secretary of the Interior</td>
<td>• Review NPS and F&amp;WS requests</td>
</tr>
<tr>
<td></td>
<td>• Assistant Secretary: Fish, Wildlife, and Parks</td>
<td>• Determine what will be submitted to Office of Management and Budget (OMB)</td>
</tr>
<tr>
<td></td>
<td>• Assistant Secretary: Policy, Budget, and Administration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• DOI Budget Officer</td>
<td></td>
</tr>
<tr>
<td>Office of Management and Budget (OMB)</td>
<td>• OMB Examiner</td>
<td>• Review DOI Budget Estimates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Determines what will be submitted to Congress</td>
</tr>
<tr>
<td>Congress</td>
<td>• House</td>
<td>• Hold hearings</td>
</tr>
<tr>
<td></td>
<td>o Sub-Committee Chairman</td>
<td>• Determine what will be in the appropriation</td>
</tr>
<tr>
<td></td>
<td>o Majority Staff Director</td>
<td>• Pass an appropriations bill that is sent to the President to sign</td>
</tr>
<tr>
<td></td>
<td>o Senate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Sub-Committee Chairman</td>
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</tr>
<tr>
<td></td>
<td>o Majority Clerk</td>
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</table>
HOMEWORK ASSIGNMENTS

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

- Demonstrate understanding of the assignments required of them
PMIS NARRATIVE

<table>
<thead>
<tr>
<th>Project Narratives - PMIS 199999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Justifications</td>
</tr>
<tr>
<td>Measurable Results</td>
</tr>
</tbody>
</table>
WELLBEING AND WORK-LIFE BALANCE

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.
How did I maintain a good work/life balance during FMLP? Well, I had a lot of help. First of all, I had a great mentor that I spoke with on a weekly basis. He helped me prioritize my FMLP workload and where I should focus my efforts. It is easy to get overwhelmed during FMLP when you start to look at the whole list of assignments. To combat that, we kept an eye on some of the bigger projects that were upcoming and how I could break them down into smaller pieces and the rest we just took a week at a time. The technique that assisted me the most was what I learned in a Franklin Covey Time Management course. Basically, you write down everything you need to accomplish in no particular order and then go back and prioritize them. I use A1 as the most important and then A2, A3, B1, B2, B3, C1, C2, and C3 as the least important. Complete all your A1’s first and work your way down the list. The most critical part in maintaining a real work/life balance, however, is to list things in your personal life as well. Dance recitals and fishing with my kids are just as important as E-courses and monthly reports. As far as E-courses go, I tried to stay at least one month ahead at all times. I would set aside some time and try to knock out at least two or three at a time. While planning the larger projects, such as papers, I would plan on a time when I could work on them and really focus. I would also have a backup plan, because something always comes up; water leak, data call, etc.

I also learned to delegate my regular workload to others. Instead of delegating, I now call it empowering. You will learn about empowerment in this course and what it will do for you and your subordinates. This was a challenge for me as it is hard to let go of some things, but the more I did it, the more it freed me up to focus on my A1’s and A2’s.

Shutting out distractions was also a key to managing my time. First of all, I closed my office door to have that intense focus time that is required for a lot of FMLP work. I then listened to music with head phones on to shut out other sounds. Turn the tone off on your email indicator. Only check email in the morning and the afternoon and respond accordingly during those times.

Finally, communication is key in maintaining a healthy work/life balance during this program. This includes your spouse, family, friends, supervisor, mentor, current and former FMLP students, co-workers, etc. Share with them the responsibilities that you have and ask for their support in accomplishing them. There is a large network of people out there that want you to succeed whether you know them or not. Good luck and enjoy the ride!

Troy Strawn, Class of 2015-2016
FIELD EXPERIENCE: DAYTON AVIATION HERITAGE NATIONAL HISTORICAL PARK (DAAV)

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 DAAV.
- Describe projects that will assist them in developing the AWP for Sea Otter Island National Park.
- Compare DAAV 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.
DAAV AND SEOT IMPLICATIONS

Directions: Read the following questions and consider what you saw and heard today during the field exercise to DAAV. 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?
WRITING WORKSHOP
Communication as a Rhetorical Situation

Thinking about communication rhetorically can make your writing more effective: the more we focus on the specific audience for whom we’re writing, the more we’re likely to persuade this audience in the ways we intend. Rhetorical thinking can also make writing easier: by helping us to see more of the elements that are involved when we communicate, it gives us a clearer sense of how we can use these elements as resources for achieving our persuasive purposes.

Rhetoric: “The ability to see the available means of persuasion in any given situation” (Aristotle); using these means of persuasion to motivate others toward changes in belief, understanding, and action.
Central Concepts

Here are some central concepts to bear in mind during our discussion today (and hopefully after our discussion as well!).

Professional Writing refers to writing that is:
- information-based
- action-oriented; and
- audience- (or user-) centered.

Rhetoric is the use of language to influence the beliefs and actions of others. The ways we use language—and the ways language is used on us—can be thought of as rhetorical situations, or interactions that involve:
- a writer (or speaker)
- a message or purpose the writer is trying to communicate or accomplish
- an audience whom the writer is addressing
- a genre (or conventionally defined kind of communication) in which the writer is communicating; and
- the cultural contexts that writer and audience occupy but may not share.

Tone is the reader’s sense of a writer’s attitude. Writers typically express attitudes toward two things in their writing: the subject they’re writing about and the reader they’re addressing. The tones we “feel” or “hear” in reading vary widely, and we have an equally wide range of adjectives for describing them. Someone’s proposal may seem “optimistic.” A supervisor’s memo may be “accusative.” A co-worker’s presentation may feel “pretentious” in some parts but “sincere” in others. While tone may seem like a lesser concern, research shows that readers are highly influenced by the explicit and implicit attitudes that writers convey.

Organized writing (1) consistently adheres to specific principles of order and structure, while (2) ensuring its audience knows what those principles are. Just as style is a matter of appropriateness for purpose, so it is with organization: texts are organized when they appropriately match the kind of reading they invite or require. Organized texts have a feeling of “flow”—that one is being pulled along through the text, even though a reader is actually doing a fair amount of work to make this happen.

Coordination and subordination are key organizational tools that help us clarify the relationships between the ideas in a sentence. Coordination (using coordinators such as and, but, or, nor, for, so, and yet) indicates that two related ideas are of equal importance. Subordination (using subordinators such as after, although, because, if, since, unless, until, when, while, and so on) indicates that two ideas are related, but one is of primary importance and the other secondary, assisting the primary idea in some capacity.

Impact is the result of writing that manages its resources effectively toward achieving its purpose for its specific audience. In other words, impact is rhetorical success.
Square One: Assessing Audience

Considering the needs, attitudes, and knowledge of your audience is always a good place to start in the writing process. It can save you the time of drafting sections that your readers don’t need in order to be persuaded in the way you desire. It can also alert you to incorrect assumptions about what they know or how they feel concerning your subject. In the end, the question of whether or not to do something in a document always has the same answer: **It depends on your audience.** Here are some general questions to consider.

### Needs

- Did my audience request this document? If not, what must I do to ensure that they will read it/act upon it in the way I desire?
- Is my audience already familiar with the genre in which I’m writing? If not, what could I do to make sure they are oriented and engaged rather than confused and irritated? Would a different genre be more persuasive?
- What kind of length and organization will best meet the level of attention my audience seems likely to bring to my document?
- When would be the ideal time to present my document to my audience? What would be the ideal means of delivering it to them (hard copy or electronic, in person or as an attachment)?

### Attitudes

- What is my audience’s current attitude toward/opinion of my subject?
- What probable objections do they have to my purpose or goal?
- What probable reasons do they have for supporting me in my purpose or goal?
- What is my audience’s attitude toward me (or my team) as author(s) of this document?
- What tone would be most persuasive? What tone do I want to avoid at all costs?
- If my document is successful, what specific attitudes do I want my audience to have about my subject? What do I want them to be ready to do now because of what I’ve written?

### Knowledge

- What can I rightly assume that my audience already knows about my subject?
- What can I assume that my audience does not know about my subject?
- Of all the information I could convey, what information is essential—the kind without which my audience cannot be persuaded in the way I seek?
- Of all the information I could convey, what information is not essential but perhaps helpful? Where might this information be placed in my document in order to be most helpful (footnotes, appendices, glossary of important terms, a separate section of background information, and so on)?
Writing with Different Kinds of Reading in Mind

We read in many different ways when we try to make sense of a text. Understanding how and when readers enact these kinds of reading allows us to more effectively write a document for the specific kind(s) of reading it is likely to invite.

<table>
<thead>
<tr>
<th>READER INVESTMENT</th>
<th>TYPE OF READING</th>
<th>PURPOSE &amp; NATURE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Scanning</td>
<td>Reading to find one specific part or parts of a larger text. Scanning is never linear—it &quot;flips through&quot; the text in search of obvious clues (like titles and headings) to help target the part of the larger whole being sought.</td>
</tr>
<tr>
<td></td>
<td>Skimming</td>
<td>Reading to determine the overall purpose or meaning of a text; reading to &quot;get the gist&quot; of it. Skimming, like scanning, relies largely on obvious clues like titles and headings, yet it is less random and much more linear: skimmers typically read first and last sentences of paragraphs in sequential order.</td>
</tr>
<tr>
<td></td>
<td>Receptive Reading</td>
<td>Reading to comprehend, in a fairly complete and detailed way, the meaning or purpose of a text. Receptive reading is linear: readers start at the beginning, end at the conclusion, and, if they pause, they usually pick up right where they left off.</td>
</tr>
<tr>
<td></td>
<td>Critical Reading</td>
<td>Reading not merely to comprehend a text’s meaning or purpose but to critique that meaning or purpose as well. Critical reading is both linear and recursive: that is, the text is read start to finish (at least once), and then specific sections are read and reread to refine one’s overall understanding of the text. Critical reading usually involves annotation of a text in some fashion—summaries in margins, arrows connecting related or repeated ideas, circles or highlights around significant concepts or terms, and so on.</td>
</tr>
</tbody>
</table>
Tone and Assertion

Most assertions are variations on a declarative sentence—the bread and butter sentence form of professional writing. Understanding the varying degrees of forcefulness our assertions convey is key to managing tone and style in technical prose. Often one clumsily worded, overly generalized, and inappropriately forceful assertion is enough to alienate a reader. Granted, readers may still have to read the rest of what you’ve written. But they don’t have to pay it the attention it might deserve, and they certainly don’t have to like it.

<table>
<thead>
<tr>
<th>STRENGTH</th>
<th>Very Assertive</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>The reason why so many facilities are poorly managed is because of inadequate documentation about the management process.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>Claims that inadequate documentation is the reason for poor management, full stop. Likely requires support.</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Moderately Assertive</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>The main reason why so many facilities are poorly managed is because of inadequate documentation about the management process.</td>
</tr>
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<td></td>
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<tr>
<td></td>
<td><em>There may be other reasons for poor facilities management (which is still the primary cause).</em></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Moderately Tentative</th>
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<tbody>
<tr>
<td></td>
<td>One of the main reasons why so many facilities are poorly managed is because of inadequate documentation about the management process.</td>
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<td></td>
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<tr>
<td></td>
<td><em>Inadequate documentation may be only one of many reasons for poor facilities management.</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Very Tentative</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One of the main reasons why so many facilities are poorly managed might be because of inadequate documentation about the management process.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>There are many reasons for poor facilities management, and inadequate documentation is possibly one of them.</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Very Tentative with Support</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>According to Green (2009), one of the main reasons why so many facilities are poorly managed may be inadequate documentation about the management process.</td>
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<td></td>
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<tr>
<td></td>
<td><em>Suggests that the conclusion is Green’s responsibility. Assertion hinges on source reliability.</em></td>
</tr>
</tbody>
</table>
Managing Your Resources in Writing

Any kind of writing is a complex act—at least as complex as the rhetorical situation (and its five component elements) that we’ve discussed. But in that complexity lies great opportunity. If we think of writing as an act that relies on different kinds of resources at different overlapping levels or scopes, then each of these levels of resources has the potential to contribute something unique to our quest for impact. The more we develop our awareness of these resources in our writing, the better we can manage them toward rhetorical success.
Types of Paragraphs

The standard deductive paragraph is a professional writing workhorse. Its common-sense structure of “here’s what I’m going to tell you, here it is, and here’s what I told you” works very efficiently to ensure that even inattentive readers get the point (or most of it, at least). But not every writing task lends itself to this pattern; there are alternatives that often better meet certain needs. What’s more, varying your paragraph style can go a long way toward curing that unflinchingly repetitive deductive rhythm that can really wear a reader down.

**Deductive.** A deductive paragraph proceeds from general to specific: it makes a claim, provides supporting evidence and analysis to prove the claim, then states that the claim has been proven. It can also expand in conclusion to explain the significance or implications of the claim that has been demonstrated.

**Inductive.** The logical inverse of the deductive paragraph, the inductive paragraph proceeds from specific to general. It presents anecdotes or information that aren’t really evidence yet, because a claim has not yet been advanced. The paragraph concludes with this general claim, making us realize how the information that preceded it is its proof. Because it withholds this claim to the end, inductive paragraphs have a kind of “a-ha!” effect. They are also seductive in ways deductive paragraphs cannot be: they invite a reader to follow a path and see where it leads, whereas the deductive paragraph reveals the destination from the very start.

**Narrative.** The narrative paragraph tells a story, or part of a story in a chain of narrative paragraphs. It can open with a claim about what the story will show (deductive) or end with a claim about what it means (inductive), but its development is largely specific to specific. Its organization is typically chronological, narrating events in their order of occurrence. Narrative paragraphs are perhaps the most readable and intuitive paragraph structure of all, for they draw upon our senses of linear time/cause and effect that are foundational elements of everyday life.

**Definitional.** A definitional paragraph develops around the specification of a concept or object. Even with simple concepts or objects, a definition can begin in many ways and proceed along many different lines. (For example, an object may be defined by its shape, size, composition, function, importance, expense, origin and history, place in a much larger scheme of things, and so on).

**Descriptive.** Descriptive paragraphs detail the appearance of something through words. They give “the lay of the land”—for example, the precise arrangement of safety equipment within a building. They make heavy use of directional cues (above, beneath, next to, and so on).

**Procedural.** Procedural paragraphs share elements of both narrative and descriptive paragraphs: they relate a series of sequential steps in order to describe what a process looks like. They make heavy use of temporal cues and indications of sequence (first, then, after, finally, and so on).
Parts of the Deductive Paragraph:
A General Model of Function

**Topic assertion and transition**
Moves from previous idea, declaring what will be shown or discussed in this paragraph.

**Evidence**
Presentation of the facts or ideas that begin to develop your topic assertion from above.

**Analysis**
Explanation of how the above facts or ideas develop your topic assertion.

**Conclusion**
Final statement of what you have developed or shown. If the paragraph marks the end of a larger section, also state here what that section has developed or proven.
# Transitional Words and Phrases

The purpose of transitions at all levels of writing is to clarify the relationships between ideas. Effective transitions allow readers to “add up” the points of your argument or presentation as they progress through it. In this sense, transitions are like trail markers or road signs, for they help readers see how they will get from where they are to where you would like them to go.

<table>
<thead>
<tr>
<th>RELATIONSHIP</th>
<th>WORDS AND PHRASES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addition</td>
<td>again, also, and, as well as, furthermore, in addition, moreover, too</td>
</tr>
<tr>
<td>Causality</td>
<td>because, consequently, since, as a result, therefore</td>
</tr>
<tr>
<td>Chronology</td>
<td>after, before, earlier, first, in the meantime, in turn, later, next, now, prior, second, since, subsequently, then, while</td>
</tr>
<tr>
<td>Comparison</td>
<td>in comparison, likewise, in the same way, in the same manner, similarly</td>
</tr>
<tr>
<td>Contrast</td>
<td>but, conversely, however, in contrast, nevertheless, nonetheless, yet, while, otherwise, still, on the other hand, to the contrary</td>
</tr>
<tr>
<td>Exemplification</td>
<td>for example, for instance, namely, specifically, to illustrate, to demonstrate, as a case in point</td>
</tr>
<tr>
<td>Explanation</td>
<td>in fact, in other words, put another way, simply stated, in essence</td>
</tr>
<tr>
<td>Summary</td>
<td>in summary, in retrospect, on the whole, to summarize, all told, all together, to recap</td>
</tr>
<tr>
<td>Conclusion</td>
<td>accordingly, in conclusion, as a result, finally, hence, in closing, lastly, therefore, thus, to conclude</td>
</tr>
</tbody>
</table>
Three Challenges for the Truly Motivated (that's you!)

Challenge #1: The Rhetorical Situation as an Aid to Writing (Easy)

Begin the next writing task you're assigned, either by yourself or as part of your writing group, by mapping out the rhetorical situation of the document. Say as much as you can about each of the elements of the situation, forging connections between them. What genre are you writing in, and how does it match the purpose? What conventions of this genre will audience members likely expect and understand? How do the needs, attitudes, and knowledge of your intended audience influence how you will go about accomplishing the purpose of this document (through its organization, style, and so on)? Such a map will better prepare you to write an effective document than pondering nothing more than this document's planned purpose.

Challenge #2: Paragraph Types (Moderate)

Take five continuous paragraphs from anywhere within a document you're writing. Equipped with our repertoire of paragraph types, (1) see if you can classify the type of each paragraph, and then (2) see if you've utilized a paragraph type that best matches the purpose of each paragraph. If you can't say specifically why a certain paragraph type is appropriate for each, then experiment with other types! If you don't hit upon another that you like better, at least this might help you articulate specific reasons why your original choice of paragraph type was appropriate.

Challenge #3: Sentence Combining (Not for the Faint of Heart!)

Take any ten continuous sentences from anywhere within a document you’re writing. Underline the ideas in each, then see if how you've coordinated and subordinated these ideas reflects their relationships and importance properly. Did you subordinate an idea to another when maybe this subordinated idea is really important enough to deserve its own sentence? Is a less important idea occupying its own sentence when it perhaps should be coordinated or subordinated? Rework them until you're sure you have the right ideas, expressed with the right relationships, in the right kind of sentence. Yes, this can feel tedious. But no one said impact was free!

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ACCESSIBILITY FOR ALL

Objectives: At the end of this session, students should be able to:
- Define accessibility and related terminology
- Locate accessibility laws and regulations that apply to NPS facilities
- Define the requirements for comprehensive barrier removal

Competencies:
I.A.7—Monitor and enforce accessibility standards and requirements.
HOW TO FACILITATE AN API EXERCISE (STUDENTS)

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
### Rubric

**Student Name:** [Name]

**Date:** [Date]

**Evaluator:** [Evaluator's Name]

**Title/Type of Work:** Group API Facilitation

<table>
<thead>
<tr>
<th>Objective</th>
<th>Good (10)</th>
<th>Fair (7)</th>
<th>Poor (5)</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clear Idea/Specific Point</strong></td>
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<td>• The presentation is clear, focused, and</td>
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<tr>
<td>expresses a relevant thesis</td>
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<tr>
<td><strong>Subject Knowledge / Evidence</strong></td>
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<tr>
<td>• Students demonstrate full knowledge by</td>
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<td>answering all questions with explanations and</td>
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<tr>
<td>elaborations.</td>
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<td>• Anecdotes and details are employed, are</td>
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<td>relevant, and clarify the theme.</td>
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<tr>
<td><strong>Organization</strong></td>
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<td>• Students present information in logical,</td>
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<td>interesting sequence that aids in audience</td>
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<tr>
<td>comprehension.</td>
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<td><strong>Audience Engagement / Communication</strong></td>
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<td>• Students demonstrate having considered the</td>
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<td>needs/wants of the audience by directly</td>
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<tr>
<td>addressing those needs.</td>
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<td>• Explanations are appropriate for a lay-audience</td>
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<tr>
<td><strong>Persuasiveness</strong></td>
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<tr>
<td>• Students have explained the value of the API</td>
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<tr>
<td>to the park as a whole and my division in</td>
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<tr>
<td>particular.</td>
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<td>• Students attempt to establish buy-in to the</td>
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<tr>
<td>API score</td>
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**Total /50**

**Evaluator Comments:**
Facilitation Planning Checklist

<table>
<thead>
<tr>
<th>Guiding Question</th>
<th>Recommended Response</th>
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</thead>
<tbody>
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<tr>
<td>Guide and Control</td>
<td>Recommended Response</td>
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<td>-------------------</td>
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<tr>
<td>How will we divide the facilitation?</td>
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<tr>
<td>Ground Rules?</td>
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<tr>
<td>How will we engage our group?</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Record and Action</th>
<th>Recommended Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>When will we bring in the tool?</td>
<td></td>
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<tr>
<td>How will we ensure consensus?</td>
<td></td>
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</tbody>
</table>
API CRITERIA

Natural Resource Preservation

None
Definition:
The asset has no positive impact on a natural resource.
Examples:
- Most Buildings
- Developed Campgrounds

Low
Definition:
The asset has minimal positive impact on a natural resource.
Examples:
- Sewage collection systems and or disposal systems (e.g., septic tanks and leach fields) that are not adjacent to surface water or wetlands.
- Toilet facilities located where resources are not at risk of significant damage or pollution from human waste (e.g., not near surface water).
- Most roads and parking areas.
- Marinas that prevent erosion and adverse impact to non-unique, endangered, or rare natural resources alongside the shoreline.
- Trails that prevent social trailing and the resulting adverse impact to non-unique, endangered, or rare natural resources.
- Hazardous materials storage facilities.
- Primitive campgrounds located in areas that minimize impact on non-unique, endangered, or rare natural resources.
- Resource monitoring and measuring facilities (e.g., weather or air quality stations) and facilities/assets that support resource monitoring and measuring (e.g., utilities, roads, trails, etc.).

Medium
Definition:
"The asset is used for restoration of state listed species or rare natural resource. OR
The asset has significant positive impact on at least one of the following:
- State listed protected species.
- Rare natural resources (that if degraded, would require extensive restoration and recovery efforts).
- Natural resources identified in foundational documents (e.g., enabling legislation, GMP, RMP, etc.) whose protection is directly tied to the park mission."
Examples:
- Toilet facilities and sewage systems near surface water or other sensitive resource such as karst formations which could otherwise be contaminated by human waste.
- Toilet facilities located near the entrance to a cave, which is home to a state endangered bat species, whose purpose is to reduce incidents of human waste deposition in the cave where it is extremely slow to biodegrade.
- Hardened trails, boardwalks, or bridges over state protected or rare natural resources.
- Wastewater collection or treatment systems where system failure or accidental discharge could enter surface water or sole source aquifer.
- Trails, trail bridges, or primitive campgrounds that limit resource damage to state protected or rare natural resources.
- Roads and road bridges that limit resource damage to state protected or rare natural resources.

**High Definition:**
"The asset has significant positive impact on at least one of the following:
Federal Threatened and Endangered (T&E) Species.
Species identified in Park’s enabling legislation.
Other resources specifically identified in legislation (e.g., Wild and Scenic River)."

Examples:
- Trails and boardwalks that carry visitors through a fragile ecosystem with minimal impacts on natural resources that are T&E species, identified in the park’s enabling legislation, or identified in other legislation.
- Wastewater collection or treatment systems where accidental discharge could enter a designated Wild and Scenic River.
- Greenhouses used to propagate T&E species.
- Protective enclosures for T&E species reintroduction.
- Toilet facilities located near the entrance to a cave, cited in the park’s enabling legislation, intended to reduce incidents of human waste deposition in the cave, where it is extremely slow to biodegrade.
- Bear proof refuse transfer stations which are located in prime habitat for grizzly bears, where they are a listed T&E species.
- Trails and trail bridges that limit access to T&E habitats.
- Roads and road bridges that limit access to T&E habitats."
Cultural Resource Preservation

None
Definition:
The asset that has no relationship to cultural resource preservation and is FRP Historic Factor 6.

Low
Definition:
The asset meets at least one of the following criteria:
- The asset does not meet the National Register criteria, but a decision has been reached through a park planning process to manage the asset as a cultural resource.
- The asset has a state or local level of significance and meets the National Register criteria, but is incompatible with the park’s legislated significance or with the park’s management objectives for fundamental resources.
- The asset has a state or local level of significance and meets the National Register criteria, but has no continuing use or potential use, based on its design or location.
- FRP Historic Factor 4 or 5.

Examples:
- State or locally significant backcountry comfort station that lacks a feasible water supply and therefore has no continuing or potential use.
- Rock-edged trails/paved sidewalk that limit access through sensitive cultural landscapes.
- State or locally significant lighthouse that is being inundated by sea level rise and therefore has no continuing or potential use.

Medium
Definition:
The asset meets all of the following criteria:
- The asset is of state or local significance and meets the National Register criteria individually or as a contributing feature of a site or district, and
- The asset is compatible with the park’s legislated significance, and
- The asset has a continuing or potential use based on its design and location.

OR

The asset meets at least one of the following criteria:
- The asset limits the impacts of visitor use on a cultural resource, where impacts could cause major degradation.
- FRP Historic Factor 2 or 3.

Examples:
- Administrative structures and grounds of a Mission 66 historic district with state significance.
- A homesteader's orchard with local significance which is compatible with the park's legislated significance and has continuing use.
- An asset that limits the impact of visitor use on a cultural resource, such as a boardwalk across a fragile archeological site.
- Tour road in a battlefield.

**High Definition:**
The asset meets at least one of the following criteria:

- The asset's preservation is specifically legislated.
- The asset is key to the park's legislated cultural significance.
- The asset is nationally significant and meets the National Register criteria.
- The asset has been declared a National Historic Landmark.
- The asset is a contributing feature to a National Historic Landmark District or a nationally significant National Register site or district.
- Asset is a fundamental resource specified in the park's foundation document or park plans.
- The asset is a prehistoric asset.
- The asset directly protects a cultural resource.
- FRP Historic Factor 1.

**Examples:**
- The Trail of Tears National Historic Trail.
- Historic National Cemetery.
- Meridian Hill Park, a National Historic Landmark.
- A historic building or structure that is nationally significant, such as the Old Court House, Jefferson National Expansion Memorial, Chesapeake and Ohio Canal System.
- The Baggage Building within Ellis Island Historic District.
- A prehistoric ruin or structure, such as a cliff dwelling, earth lodge or temple mound.
- An asset that directly protects cultural resources, such as a stand-alone museum collections storage building.
- A preservation structure over or surrounding a nationally significant cultural resource.
- Railroad turn table that is a fundamental resource identified in park plan.
- Historic Locomotive/Ship.
Visitor Use

None
Definition:
The asset is not expected to be used by park visitors.

Examples:
- Service roads to maintenance facilities.
- Any facilities behind locked gates or signed to keep visitors out.
- Employee housing areas.
- Boundary fences.

Low
Definition:
The asset meets at least one of the following criteria:
- The asset is used by approximately 1-39% of a park’s annual visitors.
- Asset is located in an area that accommodates drive experiences along roads (usually unpaved) that provide a sense of being in a remote area.
- Asset is located in a more primitive area that requires visitors to exert relatively high levels of time and energy to access them (fewer "customer touch points").
- Asset not in high-use area that delivers orientation, safety, or regulatory information about the park, or houses maintenance functions that improve the visitor experience.

Examples:
- Remote areas, paved or unpaved roads, parking areas, and trails.
- Primitive toilets and campsites in the backcountry.
- Backcountry offices, visitor contact stations, or ranger cabins that offer limited services to visitors.
- Marina for permanent docking.

Medium
Definition:
The asset meets at least one of the following criteria:
- The asset is used by approximately 40-74% of a park’s annual visitors.
- Asset is in an area with major development but focus is on visitor experience along a road, usually paved, or allows visitors to travel between major development areas.
- Asset is near developed areas, and/or is located in a natural or cultural landscape area that allows visitors to feel distant from assets that provide comfort and convenience.
- Asset is part of infrastructure that supports the visitors’ experience and enjoyment in developed or visitor use areas.
Examples:
- Likely secondary trails, secondary roads, and parking areas.
- Small groupings of campsites/picnic areas used by approximately 40-74% of annual visitors to the park.
- Water and wastewater systems in a day-use-only visitor use areas with approximately 40-74% annual visitation.
- Alternative energy, telecommunication (phone/radio/IT) or other utility systems that support approximately 40-74% visitor use.
- Multi-use marina for day use sailing and permanent docking.
- Structure for overnight visitor use in a cabin camp.
- Landscape for First Amendment activities.
- Canal, trolley, or railroad transit system.
- The fishing pier at Gateway National Recreation Area.

High Definition:
The asset meets at least one of the following criteria:
- The asset is used by approximately 75-100% of a park's annual visitors.
- Asset directly supports or is utilized by visitors located within a major visitor servicing area.
- Asset is located in a natural and/or cultural area with many people, where visitors can see, smell, and touch park resources.

Examples:
- Visitor centers, contact stations, comfort stations, lodges, stores, and restaurants in high visitation areas.
- Roads, parking areas, trails, and boardwalks providing access to primary points of interest.
- Highway assets in a Parkway.
- Presidential houses in National Historic Parks.
- Education centers, amphitheaters, and museums with visitations at approximately 75% and above of Park's annual visitors.
- Water and wastewater systems in major day use and overnight visitor servicing areas.
- Athletic fields/playgrounds for public use in an urban park.
- Canal, trolley, or railroad system that provides an interpretive experience.
- Maintained beach with high visitor use.
Park Support

None
Definition:
The asset has no function of providing support to park operations, employees, concessionaires, or park partners.

Examples:
- A historic asset without adaptive use (not used as housing or offices).
- A ruin/maintained archeological site.
- Assets used as interpretive displays.
- Park housing units that are not identified in the park Housing Management Plan.

Low
Definition:
The asset meets at least one of the following criteria:

- The asset plays only a minor role in park operations.
- The asset is specifically designed to promote recreation and welfare to park employees, concessioners, or park partners.

Examples:
- Storage buildings whose use is incidental to a concession or park partner’s core operations.
- Service roads that are used seasonally or infrequently by park employees, concessionaires, or park partners.
- Maintained landscapes around housing areas and administrative buildings.
- Storage facilities.
- Exercise trails in and around worker concentrated areas that enhance the employees’ well-being.
- Maintained landscapes such as playgrounds or sports fields used by park employees, concessionaires, or park partners.
- Concession run store or restaurant.

Medium
Definition:
The asset meets at least one of the following criteria:

- The asset is not “required” but is important for the effectiveness of park, concessions operations, or park partners.
- The asset is “Permitted” Housing as identified in the park Housing Management Plan.
- The asset is used less than full-time by employees, concessionaires, or park partners in the support of their duties.
Examples:
- Service roads and parking areas that connect operational assets (e.g., administrative buildings, maintenance buildings, housing).
- Administrative roads, parking areas, and trails that support park operations and/or support Search and Rescue (SAR) operations.
- Fee collection stations at campgrounds and marinas.
- Housing supporting environmental education programs, resource programs, or short term projects where the program would not be feasible without housing.
- “Permitted” park housing.
- Back country ranger stations (if not “required” housing and open seasonally).
- Provided facilities specifically used for organized coursework intended to improve the skills and abilities of the staff (e.g., park training facilities).

High Definition:
The asset meets at least one of the following criteria:

- The asset is used year-round by park employees, concessionaires, or park partners in the support of their duties.
- The asset provides required housing.
- The asset directly supports park safety, security, or emergency responses.
- The asset is a primary fee collection source for a park unit.
- The asset provides for the education of park employee, concessioner, or park partners’ children and/or is a child care facility.

Examples:
- Roads that are identified in the park’s Emergency Response Plan.
- All utilities that service multiple locations (e.g., electrical, water, waste water treatment, phone, radio, IT).
- Administrative offices, operational offices, maintenance shops, sign shops, equipment repair shops, vehicle fuel stations, and motor vehicle servicing shops.
- Required housing identified in the park’s Housing Management Plan or housing that is required by contract or agreement.
- Medical facilities, including laboratories.
- Emergency Operations assets such as fire brigades, ranger stations, holding facilities, and heliports.
- Schools and child care buildings for children of park employees, concessionaires, or park partners.
- Fee collection booths that are a primary entry contact point.
Asset Substitutability

Low/No Impact
Definition:
An alternative asset exists to fulfill the requirement or purpose of this asset, and the impact or cost of that "substitute", in terms of the core mission – resource preservation, visitor experience, and/or park support – is low or virtually none. For example, the distance to the alternative asset is feasible (minor), or a change in process or technology, from prior park standards, has no or a manageable cost.

Examples:
- Campgrounds inside a park where alternatives are a relatively short distance away within or outside park boundaries.
- Comfort stations where alternative buildings are only a short distance away.
- Employee training centers where training spaces (e.g. hotels or conference centers) are available at minimal cost and in close proximity to park boundaries.
- Readily available housing in the local community for park employees, concessioners, or park partners to rent or purchase.
- Roads, parking areas and trails giving access to the above examples.

High Impact
Definition:
An alternative asset exists to fulfill the requirement or purpose of this asset, but the negative impact of that "substitute", in terms of the core mission – resource preservation, visitor experience, and/or park support – is high. For example, the distance to alternative asset is too great or the alternative route is not feasible (road), or a change in process or technology, from prior park standards, is not cost effective.

Examples:
- Campgrounds, picnic areas, or playing fields in a park where alternatives are within or outside park boundaries, but they are such a large distance away as to be infeasible for visitors.
- Alternative buildings (e.g., visitor center, comfort station, ranger station) exist but are not within a reasonable distance to be a feasible alternative for visitors.
- Alternative housing exists but it is not affordable for staff or requires too great a distance for commuting.
- Cultural landscapes found in a limited number of public or non-profit units in the nation.
- Either of two trails that provide access to a significant locality.
- Roads and parking areas giving access to a non-significant locality as described in above examples.

**No Substitute**

**Definition:**
The asset is truly unique – no suitable "substitutes" exist for the functional requirement or purpose of this asset; this includes assets specifically identified as part of the park enabling legislation.

**Examples:**
- The only entrance road into a park unit.
- Roads that provide the only access to significant localities.
- Trails that provide the only access to significant localities.
- Campgrounds in a park where no other campgrounds exist within or outside park boundaries.
- Utilities (single point of failure).
- Housing for a remote park where no other housing exists outside park boundaries.
- Monuments, memorials, ruins, or unique cultural landscapes specifically named in a park’s enabling legislation, such as the Washington Monument.
HOW TO PARTICIPATE IN AN API EXERCISE (MENTORS)

Objectives: At the end of this session, students should be able to:
- Describe the importance of achieving consensus
- Describe best practices in facilitation
- Participate in a group in the API Process as a team
DLS #2 PLANNING

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.
### DLS #2 SCHEDULE

NOTE: This is for reference only. Please use the e-portfolio site for assignment details and due dates!

<table>
<thead>
<tr>
<th>Task or Event</th>
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<tbody>
<tr>
<td>Directed Field Activity- Field Experience</td>
</tr>
<tr>
<td>Webinars</td>
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<tr>
<td>Discussion Forums</td>
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<td>Monthly Reports</td>
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<tr>
<td>DLS #2 Self-Assessment</td>
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<tr>
<td>DLS #2 Individual Development Plan</td>
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<tr>
<td><strong>E-course:</strong> NPS Asset Management: Basics of Condition Assessment</td>
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<tr>
<td><strong>E-course:</strong> NPS Asset Management: Creating a Scope of Work</td>
</tr>
<tr>
<td><strong>E-course:</strong> NPS Asset Management: Basics of Cost Estimating</td>
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<tr>
<td><strong>E-course:</strong> NPS Asset Management: The CESS Interface</td>
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<tr>
<td><strong>E-course:</strong> NPS Asset Management: The CESS Spreadsheet</td>
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<tr>
<td>Request for Developmental Activity</td>
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<td>PMIS Narrative</td>
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<tr>
<td>OSHA E-Tools Topics (1-page write-up required)</td>
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<td><strong>E-course:</strong> Capital Investment Strategy</td>
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<td><strong>E-course:</strong> NPS QABECS</td>
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<tr>
<td>Portfolio: Biography and Application for Graduation</td>
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<td><strong>E-course:</strong> An Introduction to Incident Command System</td>
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<td>Task or Event</td>
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<tr>
<td>Poster Concept and Interview</td>
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<tr>
<td>Poster Content</td>
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<tr>
<td>Directed Field Experience - Team Briefing Statement</td>
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<tr>
<td>Directed Field Experience - Individual Critical Analysis Paper</td>
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<tr>
<td>Directed Field Experience - Annual Work Plan</td>
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<tr>
<td>Draft Portfolio Introduction, Artifacts and Framing Statements</td>
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<tr>
<td>Developmental Activity Report</td>
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<tr>
<td>FMLP Leadership Excellence Award - nomination due</td>
</tr>
<tr>
<td>My Leadership Framework</td>
</tr>
<tr>
<td>Critique of your FMLP Experience</td>
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</table>
ASSIGNMENT DETAILS

Webinars
For Distributed Learning Session 2, we are turning the camera on you (students and mentors). The Leadership webinars will still be facilitated by Steve Wolter, but the operational track will be facilitated by student and mentor teams. Each month, two teams will have 30 minutes to present on a reading provided to all the students and mentors. Each presentation will be given twice.

<table>
<thead>
<tr>
<th>Dates</th>
<th>Description</th>
<th>Teams</th>
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<tbody>
<tr>
<td>11/8/2016-3:00 pm</td>
<td>The Importance of Culture to Facility Management Organizations</td>
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<td>(Eastern)</td>
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<tr>
<td>11/17/2016-11:00 am</td>
<td>Definitions, Background, and Applications of Sustainability</td>
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<td>(Eastern)</td>
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<tr>
<td>12/1/2016-11:00 am</td>
<td>The Role of Strategic Planning</td>
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<tr>
<td>12/16/2016-1:00 pm</td>
<td>Sustainability in Practice</td>
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<td>(Eastern)</td>
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<tr>
<td>1/10/2017-11:00 am</td>
<td>Designing the FM Organizational Structure</td>
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<td>(Eastern)</td>
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<tr>
<td>1/19/2017-3:00 pm</td>
<td>Sustainability Financials, Acceptance, and Implementation</td>
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<td>(Eastern)</td>
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<tr>
<td>2/7/2017-11:00 am</td>
<td>Supervisor’s Desk Reference- Classification, Recruitment, and Staffing</td>
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<tr>
<td>(Eastern)</td>
<td>Compensation</td>
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<tr>
<td>2/16/2017-3:00 pm</td>
<td>Supervisor’s Desk Reference- Hours of Duty and Leave, Benefits and EEO</td>
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<tr>
<td>(Eastern)</td>
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<tr>
<td>3/7/2017-11:00 am</td>
<td>Supervisor’s Desk Reference-Performance and Conduct, Training and Development, Employee Assistance</td>
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<td>(Eastern)</td>
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<tr>
<td>3/23/2017-3:00 pm</td>
<td>Supervisor’s Desk Reference-Ethics and Integrity, Grievances, Labor Management</td>
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<td>(Eastern)</td>
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</table>
Directed Team Activity: Schedule and Assignments
Working in teams of three or four, you will be assigned a real park and, with the facility manager, will develop and propose an Annual Work Plan and Long-Range Project Plan to present to park management. You will be expected to work with each other and the management team at the park. Some of the work can be done off-site, but you will be required to travel to the park and work with the management team to present the information that you have collected and the recommendations that you are making.

This assignment, along with your Developmental Activity, will make up the bulk of your grade for the Distributed Learning Session (DLS) #2. As such, you will have resources available to you to ensure that you are able to complete this assignment successfully.

Independent Study Assignments

Assignment: SEOT PMIS Project Narratives
Description: Based on the Project Work Orders spreadsheet and the SEOT Location Hierarchy and Asset Hierarchy report (both located on the Virtual Classroom), write a draft PMIS project. Only complete the project through the Project Narratives page (i.e., only the first two pages of PMIS). For more guidance on this assignment, please download the FMLP PMIS Assignment Guidance document from the Virtual Classroom site.

Assignment: Briefing Statement
Description: As a team, write a briefing statement regarding the plan that your team created with the park during your field experience. Your audience is the Facility Manager and Superintendent of the park that you visit.

As you write this briefing statement, think about your audience. What does the Superintendent want to hear? What does he/she need to know? Are these different from the (additional) information you might provide to the Facility Manager? Within the structure of the briefing statement template, you should also include:

- The outcome of the planning process in this park
- Suggestions for updates to the PAMP (if any)
- Suggestions for next steps

After grading, the documents should be sent to the Park as a culmination of the planning process. A template is on the Virtual Classroom for your team to use.
Assignment: Leadership Framework (AKA: My Philosophy of Leadership, Revisited)
Description: Research, write, and submit a paper discussing your personal Organizational Leadership Framework. The framework should reflect your organizational philosophy (not personal philosophy) of leadership; what you learned from course lectures, readings, discussions, and webcasts; and how you will approach your role as a future leader in the parks and public lands management discipline.

Requirements: Models, visual representations, and/or organized outlines or templates are strongly recommended for this paper. In addition, you need to include citations from Daft where appropriate. You may also use articles, books, experiences, quotes from mentors or other NPS leaders, and other references to support your reflections—be sure to cite them appropriately. The paper must:

- Use sources and cite them appropriately. Go to www.citationmachine.net and use either Chicago style or APA style. You will not be penalized for using one or the other, but you should be consistent—choose one style and stick with it. For more details about these citation styles and help citing specific types of sources, visit https://owl.english.purdue.edu/owl/resource/717/1/ (for Chicago) or https://owl.english.purdue.edu/owl/resource/560/01/ (for APA).
- Be between 10-20 pages, double-spaced, with a list of references at the end (not included in page count); have a cover; and include proper citations.
- Be written as an expository paper in third person, not first or second person. (See https://owl.english.purdue.edu/owl/resource/980/03/ for more on these terms.) This paper should be written from an expert point of view, not personal opinion, and requires complex, convincing, and credible writing.

Approach: Remember, the FMLP is a course in organizational leadership, not activity leadership, personal leadership philosophy, or morals and ethics. It will be helpful for you to project how one leads a large organization of different types, be it a major unit of a large park, an entire park maintenance division of a park, a park itself, or any other similar organization. This paper should provide a foundational framework for how a leader, using your organizational framework, would apply the concepts and ideas in this course, and from other sources, in an organizational leadership approach for an organization.

Emphasis: The paper should reflect a synthesis of the knowledge you have gained in this course to date and your personal experiences to create an organizational leadership framework. This is considered an opportunity to develop an organizational leadership framework that best describes how you would lead a unit based on the knowledge gained in this course and your personal experiences with leadership in the past year.
Assignment: Critique of your FMLP Experience
Description: This 2-3 page, single-spaced paper should provide feedback to the course coordinators and developers concerning your feelings on both the positive and negative aspects of the FMLP. What were the highlights? What could be improved for future classes? What recommendations do you have for topics that should be included or removed from the course of study?
Developmental Activity: Schedule
You are required to do one Developmental Activity during Distributed Learning Session #2.
Complete your Request for Developmental Activity (or activities), and send it to your mentor for review. This one should be conducted in your park and be an activity outside your normal scope of duty.

After reviewing comments given by your mentor, upload your Request for Developmental Activity to the e-portfolio site.

Conduct your Developmental Activity.
Submit your Developmental Activity final report, including completion of the Request for Developmental Activity form, written reports, and other materials that support your activity, to your mentor for review. Make necessary adjustments based on your mentor's feedback.

After reviewing comments given by your mentor, upload your Developmental Activity to the e-portfolio site.

Remember that your individual developmental activity should be a direct result of the revision and update of your Individual Development Plan (IDP) and your self-assessment. The activity should directly address one or more of the gaps you have identified in these two documents.
Developmental Activity: List of Activities

- Analyze FMSS deferred maintenance data and develop a PMIS proposal to address the backlog.
- Conduct or participate in a Comprehensive Condition Assessment in your park or a nearby park.
- Develop emergency plans for 2–4 assets and conduct an emergency drill.
- Develop a proposal for purchase of a PDA and implementation of Mobile FMSS. If approved, track any changes in efficiency and prepare a report for senior management detailing cost savings and benefits.
- Identify one future project that requires compliance, enter the project in PEPC, and work with the resource management staff as they conduct their review and analysis of the project.
- Keep weekly records of a long-term project being conducted at your park and track planning and work in the FMSS.
- Develop and deliver an in-house training for Mobile FMSS.
- Develop an annual budget plan, including personnel cost, for one maintenance activity PWE.
- Develop a fleet-use matrix utilizing alternative fuel vehicles.
- Submit a Completion Report for a project or activity.
- Job swap with a neighboring park.
- Develop an Approved Product List for your park with an interdisciplinary team.
- Using the latest CRV calculator, recalculate CRVs for twenty assets in your park.
- Create a year’s budget for your maintenance division, or a portion of your division if you have more than twenty employees, using a spreadsheet that will be provided.
- List all the PMs for a FY that the assets should receive, and produce a schedule for when they should happen. Determine the cost of these PMs.
- Present to the park Management Team the application of FCI and API and Optimizer Banding to priority setting for the Servicewide Comprehensive Call.
- Create and lead an inter-divisional team in developing a list of assets that could be decommissioned.
- Develop a Briefing Statement for your park on Asset Management and/or Maintenance Backlog.
Portfolio Guidance

**Portfolio is due at Capstone 2017**

What is the Capstone Portfolio?
A Capstone Portfolio is a body of work that:
- Is a comprehensive representation of your individual growth and achievement during your year as a student in the Facility Manager Leaders Program (FMLP).
- Showcases the skills you have gained/perfected throughout the course of study.
- Is organized and explained in a logical way.
- Serves as a marketing tool for present or future employment ventures: your skills and research are made tangible to a prospective employer through the portfolio.
- Provides the opportunity for you to demonstrate what you think about the knowledge you acquired during this year's course of study and related professional experiences.
- Serves as the basis for self-reflection and acts as the foundation for a conversation between you and your fellow classmates, members of the Servicewide Maintenance Advisory Committee (SMAC), and other divisions within the NPS.
- Is a sum of your competency development this year.

What is the purpose of the Capstone Portfolio?
Your Capstone Portfolio serves the following purposes:
- To highlight the specific competencies that you have mastered during the FMLP (or are beginning to master). The process should help you to document the quality of your work, both in your courses and during your Interim periods.
- To allow you to reflect on your growth and development in the professional practice of facility management.
- To be used for performance reviews or as a tool for job interviews. Think of it as an expansion of a job resume. A portfolio can provide the hard evidence of the professional experience that an interviewer might be looking for.

What do I include in my Capstone Portfolio?
Your portfolio should include a selection of your work that represents you and defines your knowledge base. You may choose to include your independent study papers, PowerPoint presentations, PAMP analysis paper, and/or developmental activity reports. You will decide on the work that best illustrates your individual growth and achievement during your year as a student in the Facility Manager Leaders Program (FMLP). Ask yourself first: “What do I know as a result of this year-long course of study?” and then: “How can I display that knowledge?” Each
artifact should be accompanied by a framing statement, that is, a brief description of why you chose it and why it is significant to you. Your works are the core of your portfolio, and you may find a common theme that ties them together, such as leadership, or personal and professional growth and development.

What will the Capstone Portfolio look like?
A 3-ring binder, tabs, clear paper sleeves, and professional paper will be mailed to you in the upcoming weeks. It is your responsibility to design and piece together your portfolio using the supplies we provide, as well as any other materials you would like to add. These components, along with your chosen work, framing statements, and mini biography, will make up your portfolio. You will determine the order of the contents in your portfolio. However, the contents should have a specific purpose and flow, there should be separate sections for separate topics, and the language should be professional and brief as you learned in your technical writing session during Advanced Facility Management Practices (AFMP).

Creativity
We would like to see your personality shine through in your portfolio. Please personalize your portfolio and use your own creativity. The portfolio must include (but is not limited to) the following:
Portfolio Contents
A. Demographic Sheet:
   - Name
   - Professional Photo
   - Personal Biography
   - Number of years in the NPS
   - Specific jobs and number of years at each park
   - Your personal best leadership experience and best memory in this program (100 words maximum)
   - Professional aspirations and goals (50 words maximum)
   - Why is the NPS important to you? (50 words maximum)
   - An inspirational quote, leader, or idea you would like to share

B. Introduction and Table of Contents
   A short introduction of about 200 words should set the stage for your portfolio and let your reader know what it contains. This should be followed by a table of contents. See the attached sample.

C. Your work and Framing Statements (see attached samples)
   You should include at least five examples of your work, which can include the following:
   - A Developmental Activity Write-up
   - A copy of the PowerPoint used for an oral presentation you have given
   - A homework assignment you are particularly proud of (such as Flight 93 worksheet)
   - A paper that you have written, such as an independent study project
   - A copy of a report or product that you have helped to develop at a Park (fictional or real)
   - Anything else of significance you wish to include

Your framing statement might answer some of the following questions:
   - Why did you choose this artifact to be included in the portfolio?
   - How does this artifact relate to the theme of the portfolio?
   - How did creating this artifact increase your learning?
   - How does this artifact relate to the professional practice of facility management?
   - What changes would you make to this artifact based on what you learned in classes later?
   - Did you implement the idea represented in this artifact? If so, what was the result? What changes would you make?
   - What future growth might arise from this artifact?
D. Completion Certificates
You should include completion certificates from all of the training and education courses you have completed in the past two years. These should be printed in color and placed in the back of the portfolio in the clear sleeves provided.

E. Current Resume
This is your opportunity to update your resume and include it in your portfolio.
Portfolio Introduction (sample)
The purpose of this portfolio is an attempt to highlight both the philosophical and the practical as a demonstration of a whole body of knowledge. The works selected were done so to highlight the manner in which I took what I had learned and assimilated it into my reality as an adult educator and, in turn, into my professional life. Some reflect personal philosophies, such as my personal philosophy of adult education; some are research-based, such as a book review of Kirkpatrick’s Four Levels of Evaluation; while others actually show the practical application of models or adult education “in action.” There are also works that attempt to shed some light on constructivist theory and the difficulties encountered with an online learning environment as opposed to a classroom environment. It is my hope that this compilation shows a full picture of my body of knowledge in adult education.

This particular body of knowledge, however, is grounded in the area of training, where the primary purpose of the organization is not to educate adults, but rather to serve as a means to improve organizational effectiveness. Although I am an employee of Indiana University with an academic appointment, the focus of my work is in the area of training and education. The elements provided here, however, highlighting the theme of applying philosophical and theoretical foundations into practice, could be applied to community-based education, outreach adult education organizations, and formal adult education institutions.
<table>
<thead>
<tr>
<th>BIOGRAPHY</th>
<th>Biography</th>
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</thead>
<tbody>
<tr>
<td>YOUR WORK</td>
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<tr>
<td>SEOT Park Asset Management Plan</td>
<td>Artifact 1</td>
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<tr>
<td>SEOT Data Analysis Documentation</td>
<td>Artifact 2</td>
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<tr>
<td>Fort Sumter NHS PAMP – Draft</td>
<td>Artifact 3</td>
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<tr>
<td>Individual Report on the Fort Sumter PAMP Experience</td>
<td>Artifact 4</td>
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<tr>
<td>Presentation Made at National Conference Relating to Acting Detail</td>
<td>Artifact 5</td>
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<tr>
<td>RESUME</td>
<td>Resume</td>
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<tr>
<td>CERTIFICATES</td>
<td>Course Completion Certificates</td>
</tr>
</tbody>
</table>
Biography (sample)

CHRISTY MCCORMICK

Number of Years at Eppley: 14
Positions Held:
Senior Program Manager
Deputy Director
Associate Director
Program Manager
Project Manager
Project Coordinator
Project Associate

Personal Best Experience:
My involvement in the Facility Manager Leaders Program (FMLP) has been one of the most enriching experiences of my professional career. I feel very fortunate to work with the individuals involved in developing and presenting this program, but it has been most fulfilling to work with the students. I have found them to be engaged, ambitious and dedicated, and, above all, consummate professionals taxed with the balance of excelling in a rigorous educational program and, at the same time, fulfilling the requirements of their day-to-day jobs.

Professional Aspirations and Goals:
I would like to continue my work with the Park Facility Management Division (PFMD) and enhance my professional growth through the exploration of new techniques and methods of delivery to maximize learner engagement. With each successive visit to a park/unit, I learn more about the challenges faced by today’s facility managers in the National Park Service (NPS). My goal is to assist these professionals in their growth to help them in the stewardship of the country’s most important cultural and natural assets.

The National Park Service is important to me because:
I have never in my professional career met a more dedicated and diverse group of individuals. This is particularly true with my interaction with those individuals in the field of facility management. They have educated me in the importance of the care of a diverse asset portfolio and the importance of the mission of the NPS, which is to "preserve unimpaired the natural and cultural resources and values of the national park system for the enjoyment, education, and inspiration of this and future generations."
A Quote that inspires me:

I will finish with a quote that I read in my first adult education course, *Introduction to Adult Education and Theory*. One simple sentence helped me begin to define my personal philosophy in my pursuit of a graduate degree in adult education. It also helped me to define why the development of a working philosophy has improved my effectiveness as an adult educator.

"Theory without practice leads to an empty idealism, and action without philosophical reflection leads to mindless activism"

Artifact #1-Framing Statement (sample)
Personal Philosophy Paper
Submitted: May 1, 2015

Introduction
This artifact was written as the final project for my first course in adult education and the first formal paper I had written in almost twenty years. I chose this as my first artifact because the definition of a personal philosophy assisted me in all of my subsequent courses. It also required reflective practice to link my thoughts and beliefs about adult education with reflection. Reflective practice is a system that I try to incorporate in all of my coursework.

<PERSONAL PHILOSOPHY PAPER HERE>

Conclusion
By reflecting on my own personal beliefs and values in adult education philosophy and understanding the “why,” this paper was a benefit to all subsequent classes. I used it as a foundation but also incorporated new information and, perhaps subconsciously, I modified my initial philosophical leanings expressed in this first attempt. Further reflection cemented those concepts I identified in that first paper. Finally, the direct application to my professional practice benefited from this articulation of my beliefs and values.
Portfolio Assessment

How will the portfolio be assessed? The scoring rubric below will be used to assess your portfolio. Three evaluators will assess each portfolio. Their scores will be averaged to comprise the student’s final portfolio score (Rubric subject to change).
# PORTFOLIO PRESENTATION RUBRIC

<table>
<thead>
<tr>
<th>Objective</th>
<th>Criteria</th>
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<th>5</th>
<th>10</th>
<th>Points</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Introduction</td>
<td>Introduction is vague and primary thesis is absent. Portfolio and its contents are not referenced or thematically linked to each other.</td>
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<td></td>
<td>Portfolio theme is loosely established and linked to the contents of the portfolio. Introduction is weakly developed and ideas are vague and general in nature.</td>
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<td>A theme is clearly established and links to the entirety of the portfolio presentation. Introduction thoroughly explains presented ideas and strongly links to the contents of the portfolio.</td>
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<tr>
<td>Artifact (Framing) Statements</td>
<td>Statement is unclear in revealing why it was selected for inclusion. Statement is not tied to portfolio theme.</td>
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<td>Statement is confusing and/or loosely linked to the theme of the portfolio. Learning is alluded to but not overtly stated.</td>
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<td>Statement is expressive and explanatory of why it represents the student’s progress over the FMLP course of study. Material is presented as part of a comprehensive thematic presentation of student materials and discusses the student’s learning. Artifact statement reflects student growth and forecasts future learning or growth.</td>
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<tr>
<td>Resume</td>
<td>Resume is obviously outdated and not currently relevant to the experience and status of the student.</td>
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<td>Resume is partially updated but does not reflect the FMLP experiences. The document is not readily usable for a job posting.</td>
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<td>Material is fully updated and reflects current employee status. Document is usable in a job application context.</td>
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<td></td>
<td>Statement is not relevant to student or student experience. Nothing is learned about the student in the statement.</td>
<td>Statement is merely a listing of activities and involvements; material is general and reader has no sense of the individuality of the student.</td>
<td>Statement reflects the activities and interests of the student in a compelling and interesting way.</td>
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<tr>
<td>Bio Statement</td>
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<tr>
<td>Creativity</td>
<td>Additional points may be awarded for creativity and exceptional presentation and writing.</td>
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<td>Total</td>
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Poster Guidance

What is a poster presentation?
A poster session combines text and graphics to make a visually pleasing presentation. Typically, a professional poster involves showing your work and/or experience to numerous colleagues, researchers, supervisors, or other interested parties at a conference or seminar. As viewers walk by, your poster should quickly and efficiently communicate your experience. Unlike the fast pace of a slide show or verbal presentation, a poster session allows viewers to study and restudy your information and discuss it with you one-on-one. Often you are also required to give short presentations on your research every ten or fifteen minutes. You should be prepared to do so for this assignment.

What are the specifics of the FMLP Capstone Poster Presentation?
The FMLP Poster Presentations will be delivered during the Capstone course. Your poster presentation will be, in part, a graphic representation of your experience as a student in the FMLP. Additionally, you will be expected to give short presentations (about five minutes) on your poster content. Most likely you will be presenting to a small group of individuals at a time. Keep your presentation professional but also informal and interactive, giving your audience a chance to respond to the presentation and ask questions about your experiences in the program.

Who is my audience?
Your readers/attendees will have some background knowledge of the Facility Management career field. Be ready to address the expected audience of the poster presentation. Expected attendees include:

- Department of Interior (DOI) and National Park Service leadership
- PFMD leadership
- Servicewide Maintenance Advisory Committee (SMAC) members
- Course managers and designers
- FMLP Mentors
- The “intelligent layperson”

What should be on the poster?
Write your poster for the readers who have background knowledge. You may wish to prepare supplemental information to hand out to your audience. If you do prepare (optional) handouts, be sure to mention during your presentation that handouts are available. If you do not have time to prepare detailed supplements, at least tell individuals who need more information that you can talk to them in greater detail after your presentation.

Draft several alternative texts for your poster and ask a wide range of viewers/readers to tell you which ones seem clearest. A poster design that is simple and eye-catching will help you grab the attention of passersby and make your
graphics, message, and text clear, understandable, and concise. Staff members at the Eppley Institute will assist you in preparing text and graphics for your poster.

The preparation for your poster takes longer than you might think, so get started right away and adhere to the deadlines given. For more specific information on the contents of the poster and deadlines for the project, please see the deadline calendar at the end of this section.

What should I present, and how?
The poster session presentation should tell the viewer WHAT, WHEN, WHERE, HOW, and WHY, as well as SO WHAT? and/or NOW WHAT? You should be able to answer each of these questions in a sentence or two, using language that the intelligent layperson can understand. In more formal "research" terms, these are often listed as INTRODUCTION & RATIONALE, RELATED LITERATURE, METHOD, FINDINGS, and IMPLICATIONS. Using this outline, you can craft a presentation about your experience, research, or project that will keep most people interested.

How is the portfolio incorporated into the poster presentation?
The FMLP portfolio is your reference work for your poster session and is a competency summation for your experience. You should refer to it in your presentation and use it in the presentation if you can. One method is to simply refer to it and indicate what is in it, what it represents to you and your experience in the FMLP, and that it is available for review. Another method might be to refer to it directly and, toward the end of your presentation, actually hand it to an audience member, encouraging him/her to look at it and pass it around. A third approach would be to include a summary of the portfolio on the audience handout. Whatever method you choose, be sure to refer to the portfolio and the culmination of this experience, including your Personal Best Leadership Experience.

Tips for the Poster Presentation
• This is not as formal as a speaking presentation at a conference or meeting. While your dress and overall style should meet standards for professional presentations, your approach may be more personable, with handshakes, introductions, and sharing with the audience before you start your presentation. Think of it as “gathering people up in a net” before you present. If you rush too fast with the net, they’ll scare off and you’ll have to chase them—a bad thing to do in the field and at a professional meeting. If you move too slowly or jerkily, you’ll never catch them. Use the strength of your personality and your confidence to gather an audience and start your presentation.
• Relax a bit and enjoy this poster session. Remember, there is no one in the room who knows more about your experience and position than you do.
• Even though listing your method (when, where, how) is very important, most people are more interested in the "why" (what was it that led you to the action, research, or professional development opportunity your poster
describes?) and the "so what" (what are the implications of your work for you as a student or facility manager, or for your park, the NPS, the field, etc.?), and the "now what" (what follow-up is intended for you, the NPS, your park, etc.?).

- It is a good idea to have some sort of handout to accompany the poster session. This can be a reproduction of the text displayed, or it might be a summary of the work. Sometimes people hand out other supplemental materials, such as samples of work and a list of related references, an activity guide or unit/lesson plans, etc. It's important to have something for people to take away; we all like to receive handouts!
- Provide information about where/how you can be contacted, both on the poster and in any handouts. You may want to include some business cards in your portfolio for attendees to pick up or for you to distribute.
- Don’t stand directly in front of your poster. Stand off to the side so your audience is able to read it.
- Try not to get too engrossed with one individual, since this will prevent others from viewing your poster or asking questions.
- Don’t read directly from your poster. Prepare talking points based on your poster content. Never turn your back to your listeners. If you think you will need to be reminded of your poster’s content, make a printed copy to reference during the presentation.
- Allow your audience to read your poster and take in all the information provided. After a time, ask them if they have questions or if you can elaborate on any specific points.
- Use your portfolio to add more in-depth information.
- Enthusiasm is contagious. If you’re excited about your work, your audience will be, too!
Problems to Anticipate

Problem 1 - A viewer asks questions during the presentation that disrupt the experience for others.
Common problems like this occur, and you must indicate to the viewer that you are very interested in discussing these issues with her and others after the overall presentation and specifically ask her if she would stay after to talk.

Problem 2 - No one comes to your poster.
Walk over to your next-door neighbor and ask her to stand by you in between your two posters. Two people together often attract other people. If a viewer walks by and seems interested, you can ask her if you can give her more information, then pass her on to your neighbor poster presenter.

Problem 3 - Viewers indicate that they do not have a lot of time for your presentation.
Give them the two-minute, high point, "geez, I am excited" presentation. It will make a difference, and they may stay and ask more questions.

Problem 4 - Viewers look at the poster but seem like they do not want to engage in talking to you.
Is that so bad? Maybe, but it might just be the nature of the viewer. Ask her if you can give her any more information, where she is from, or if she likes your poster. Be conversational and smile!

Problem 5 - A very good poster and presentation next to mine is dominating the presentations.
Why not hang out on the outskirts of the other poster's viewers and take notes about how you can improve? Then you can make contact with other viewers who may then turn to you for comment, advice, or questions.

Problem 6 - Anything else can and will happen.
Be flexible and have fun. Remember, you are the expert on YOUR poster session and this is about you, your opinions, your experiences, and your abilities.

Poster Elements
1. Photos and Visuals
An appropriate size for photos is usually 5" x 7". You may wish to have one photo that is larger, but do not use any prints that are smaller than 5" x 7". A graphic designer will be sizing your photos, so use the highest resolution possible.

The photos or graphics should help you to limit the text you include on the poster. Remember, a picture is worth 1000 words!
You may wish to use other graphics, but they must be in digital format, saved as a jpeg, and at least 300 dpi. You can have images scanned at a business like Kinko’s. Images include:
Maps
Charts
Graphs

2. Text
Preparing a poster is very different from writing a paper. Your goal is to use spare language to make your point. You may wish to break the text by using bulleted or numbered lists and/or appropriate white space. A wall of text is not appealing to your audience.

Spelling and punctuation should be checked very carefully. Ask someone else to proofread what you write.

You should include three sections of text. One of those should be a summation from your Best Leadership Experience paper from the FMLP. See “Poster Content” below for more details.

Each piece of text will have a strict word limit (see below) and will be edited.

3. Layout
The design, layout, and printing, which will be done through Indiana University, is time-intensive. Because of this, edits to the product may not be honored. If you do not adhere to the deadlines, your poster may not be available for display at Capstone Study in Facility Management.

NOTE: All elements [graphics, text, photos] may not be included on your final product. You will have the opportunity to review, but your poster will be designed to provide the maximum impact to your audience.
Poster Content
1. Title (max: 10 words)
The title of your poster should not be more than ten words and should sum up what you think this year was all about. It should include the leadership component in some way.

EXAMPLES:

<table>
<thead>
<tr>
<th>FACILITY MANAGEMENT AND MY VISION OF LEADERSHIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAPTING TO THE CHANGING DEMANDS OF FACILITY</td>
</tr>
<tr>
<td>MANAGEMENT</td>
</tr>
<tr>
<td>MY PURSUIT OF EXCELLENCE</td>
</tr>
<tr>
<td>THE FACILITY MANAGER LEADERS PROGRAM: PERSEVERANCE PAYS</td>
</tr>
</tbody>
</table>

2. Overall Theme
While your theme will not appear on your poster, it is imperative that you think about your poster holistically. Your title should speak to the graphics and text of the poster. It should speak to both your Best Leadership Experience and your Most Meaningful Experience.

3. Best Leadership Experience during the FMLP (max: 100 words)
This should have no more than 100 words. They may be written as a block of text, or you may combine text and bullets. You may wish to quote directly from your paper.
EXAMPLE:

**MY PERSONAL BEST LEADERSHIP EXPERIENCE: PERILS AND PITFALLS OF A FOCUS GROUP**

- **THE NEED:** MENTORS NEEDED A FORUM TO VOICE THEIR EXPERIENCES AS MENTORS IN THE FIRST YEAR OF THE FACILITY MANAGER LEADERS PROGRAM. THE CHALLENGE WAS TO LISTEN TO CONCERNS WITHOUT JUDGMENT, WHILE STILL MANAGING THE FACILITATION PROCESS.

- **THE SOLUTION:** THE SESSION WAS CO-FACILITATED TO ALLOW FOR ONE TO EXPRESS OPINIONS AND THE OTHER TO REMAIN NEUTRAL.

- **THE RESULT:** IN A ONE-HOUR SESSION, WE WERE ABLE TO DEFINE STRATEGIES TO ASSIST IN THE NEXT SIX MONTHS OF PLANNING AND PROVIDE GUIDANCE FOR THE NEXT CLASS OF MENTORS.

4. Your Most Meaningful Experience (max: 75 words)
You want to keep your poster content simple, yet interesting, for your audience. In addition to your Best Leadership Experience, you should highlight one or more additional meaningful experiences on your poster. Perhaps you want to use one of your developmental activities. You may wish to use your Directed Field Experience, although you should check with your other team members so there is not too much duplication in poster content. Ask yourself:

What is the one essential concept you want to get across to your audience? Perhaps you revised CRVs for your park assets, facilitated a comprehensive condition assessment, managed a major project, or conducted a Value Analysis. Why did I choose this? Perhaps it was a result of your IDP or a need expressed by your park. Provide background here.
- Who was involved?
- Where did this activity take place?
- How was this accomplished (methods, procedures, implementation)?
Advanced Facility Management Practices

- So What? What were the results, implications, evaluation, conclusions, or benefits? This is probably the most important—how did this one concept or activity tell the story of your year?
- Now What? Where are you going next? What will you do as a result of this one essential concept?

Capstone Poster Critique
Directions: Using the statements below, score each poster on a 1 (did not meet content requirements) to 5 (exceeded content requirements) scale. Use the comment space to write down the positives and/or negatives you observe.

<table>
<thead>
<tr>
<th>Poster Sample 1</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>The poster focuses on a well-defined theme.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The graphics and text support the overall theme of the poster.</td>
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<tr>
<td>The leadership experience is characteristic of a true leadership experience.</td>
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<tr>
<td>Overall, the language is meaningful and lacks vagueness.</td>
<td></td>
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</tr>
</tbody>
</table>
STRENGTHS BASED LEADERSHIP FOR MENTORS
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 to 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. Like-wise, 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.
**Intellecction**
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 Intellecction 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 some- times 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.
RE-OPTIMIZATION WORKSHOP

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.
The Mettle of a Mentor: What it Takes to Make This Relationship Work for All

By Vicki M. Denmark and India J. Podsen

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William Fox had mixed feelings when the principal assigned him to be a buddy for a first-year teacher at Kingston High School. He had just completed his fifth year teaching math and expected to finish his master’s at a nearby university the next semester. He wondered why the principal had asked him to take on this assignment and hoped it wouldn’t require any after-school time. He didn’t know how to mentor a teacher, but decided that he would be a friend to the teacher and hoped this would suffice.

The principal had a brief orientation for the seven first-year teachers and their assigned teaching buddies. Fox concluded that the meeting was more of an overview of school rules and procedures than a chance to clarify the expectations of the buddy system that had materialized over the summer break. At the end of the session, Fox met Tom Wilson, the new teacher, and encouraged Wilson to call on him when the teacher had questions or needed help.

A few weeks passed and Fox had not heard from the teacher. Fox felt that no news was good news but left a note in the teacher’s box to convey the notion that he hoped things were going well. The new teacher responded with a few questions about supplies and duties and not much of anything else. Fox peeked in on one of Wilson’s classes a few days later only to discover that the toughest kids in that grade level had been “dumped” on him.

Rites of passage

Wilson completed the first semester as a beginning teacher, then resigned before the year was over.

Does this story sound familiar?

Let’s discuss what happened here and how it can be improved through application of a mentor competency framework.
Principles of Adult Mentoring: Self-Rating

Directions: For each of the following 55 statements, circle the word (never, infrequently, sometimes, frequently, or always) that is most representative of your behavior as a mentor. Please answer all of the statements.

1. I encourage Protégés to express their honest feelings (positive or negative) about their work-related experiences (including such dimensions as training, educational opportunities, and social relationships).
   Never Infrequently Sometimes Frequently Always

2. I discuss with Protégés who are discouraged (due to lack of promotion or other difficulties) the importance of developing a realistic view of work-related advancement that can include both success and disappointment (mentioning, for example, other Protégés who have been frustrated but still continued to explore opportunities to learn and enhance their marketable knowledge, skills, and behaviors at work).
   Never Infrequently Sometimes Frequently Always

3. I ask Protégés for detailed information about their progress in learning all aspects of their job.
   Never Infrequently Sometimes Frequently Always

4. I refer Protégés to other staff members and departments to obtain information relevant to pursuing their individual educational, training, and career development plans.
   Never Infrequently Sometimes Frequently Always

5. I attempt to be verbally supportive when Protégés are emotionally upset.
   Never Infrequently Sometimes Frequently Always

6. I suggest to Protégés that we establish a regular schedule of meeting times.
   Never Infrequently Sometimes Frequently Always

7. I make a good deal of eye contact with Protégés during our meetings.
   Never Infrequently Sometimes Frequently Always

8. I suggest that Protégés who indicate concerns about serious emotional or psychological problems meet with a counselor (if they have not already done so) responsible for assisting Protégés in the workplace (or suggest they consult with a professional outside the workplace, if necessary).
   Never Infrequently Sometimes Frequently Always
9. I ask Protégés to identify their career choices and to explain their strategies for continuing work-related training and learning to support the achievement of these career goals.
   Never  Infrequently  Sometimes  Frequently  Always

10. I encourage Protégés to provide a good deal of background information about their preparation, success, and problems in pursuing their career plans.
    Never  Infrequently  Sometimes  Frequently  Always

11. I inquire in some depth about Protégés' strategies for utilizing workplace resources to increase their on-the-job learning and (if necessary) offer practical suggestions and/or refer them for assistance to improve their job performance.
    Never  Infrequently  Sometimes  Frequently  Always

12. I explain to Protégés that I really want to know what they as individuals honestly think about issues (such as balancing job requirements and/or career development commitments and outside responsibilities) so that I can offer advice specific to them.
    Never  Infrequently  Sometimes  Frequently  Always

13. I arrange my meetings (when possible) with Protégés at times when I will probably not be interrupted very much by telephone calls or other people.
    Never  Infrequently  Sometimes  Frequently  Always

14. I point out to Protégés the necessity of obtaining accurate and detailed information about their career options, especially those who have insufficient factual information about such issues as additional and/or changing work-related training and educational requirements or preparing for the personal psychological/emotional transition between job fields.
    Never  Infrequently  Sometimes  Frequently  Always

15. I encourage Protégés to consider “nontraditional” (such as television and correspondence-based) courses as well as more formal educational opportunities to develop their career interests.
    Never  Infrequently  Sometimes  Frequently  Always

16. I point out inconsistencies (rationalizations) in Protégés’ explanations of why their job performance and/or career goals were not achieved if I believe my comments will help them develop better coping strategies to deal with their problems.
    Never  Infrequently  Sometimes  Frequently  Always
17. I try to stimulate Protégés to do more rigorous critical thinking about the long-range implications (time and energy commitments for additional training and education) their career choices may have for increasing the complexity of their lives to help them plan, prepare, and adapt to “predictable” lifestyle changes.

| Never | Infrequently | Sometimes | Frequently | Always |

18. I explain to Protégés why they should discuss (even with someone else) significant work-related problems they are presently confronted with even if they prefer not to deal with these issues.

| Never | Infrequently | Sometimes | Frequently | Always |

19. I offer recommendations to Protégés about their current and future training and educational needs (from basic to advanced skills and learning) based on specific information provided by them regarding their history of previous training, experience, and academic/technical preparation.

| Never | Infrequently | Sometimes | Frequently | Always |

20. I tell Protégés when I think their ideas about career or educational concerns (such as promotional opportunity, entry into a different job, or future training and degree requirements) are very clearly based on incomplete or inaccurate information.

| Never | Infrequently | Sometimes | Frequently | Always |

21. I attempt to guide Protégés in exploring their own personal commitment to their stated career and work-related educational interests by posing alternative views (such as other career and training/education options) for them to consider.

| Never | Infrequently | Sometimes | Frequently | Always |

22. I attempt to guide Protégés in exploring their own personal commitment to their stated career and work-related educational interests by posing alternative views (such as other career and training/education options) for them to consider.

| Never | Infrequently | Sometimes | Frequently | Always |

23. I verbally communicate my concerns to Protégés when their negative attitudes and emotions are expressed to me through such nonverbal behaviors as eye contact, facial expression, and voice tone.

| Never | Infrequently | Sometimes | Frequently | Always |

24. I discuss Protégés’ general reasons for planning to obtain additional work-related educational credentials or training and then focus on helping them identify concrete degrees, curricula, courses, and workshops.

| Never | Infrequently | Sometimes | Frequently | Always |

25. I provide a reasonable amount of factual guidance in our discussions so that Protégés will explore realistic options and attainable career objectives.
26. I ask Protégés to review their plans for managing the current or anticipated changes in their personal lives (such as impact of increased pressures on their family and social relationships) while they pursue their job and career-related educational goals.

Never Infrequently Sometimes Frequently Always

27. I question Protégés’ assumptions (especially about career options and the choice of additional training and education) as a way of guiding them through a realistic appraisal of the extent to which their important ideas and beliefs are based on adequate personal experiences and facts.

Never Infrequently Sometimes Frequently Always

28. I discuss my own work-related experience as a way of helping Protégés think about and carefully examine their career options.

Never Infrequently Sometimes Frequently Always

29. I share with Protégés personal examples of difficulties I have overcome in my own individual and professional growth if these experiences might provide insights for them.

Never Infrequently Sometimes Frequently Always

30. I engage Protégés in discussions that require them to reflect on the new competencies they will need to achieve their future goals.

Never Infrequently Sometimes Frequently Always

31. I point out (using personal examples as well as stories about other Protégés) that career achievement is primarily based on personal commitment and planning (rather than just “luck”) to Protégés who are having problems completing all of their job and educational (training and/or academic course) assignments but appear unrealistic about the amount of discipline and energy needed to cope with the pressures of contemporary career advancement.

Never Infrequently Sometimes Frequently Always

32. I express my personal confidence in the ability of Protégés to succeed if they persevere in the pursuit of their career goals.

Never Infrequently Sometimes Frequently Always

33. I confront Protégés with the reality of continued probable negative consequences in a direct (but supportive) manner when they repeatedly do not follow through on their stated intentions to deal with serious job and/or career-related problems.

Never Infrequently Sometimes Frequently Always
34. I encourage Protégés to use me as a sounding board to explore their work-related hopes, ideas, feelings, and plans.

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35. I engage Protégés in discussions aimed at motivating them to develop a positive view of their ability to function now and in the future as independent, competent adult learners in the workplace environment.

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36. I use my own experience (personal as well as references to other Protégés I have advised) to explain how training workshops, educational programs, and job rotational opportunities that Protégés believe will not be career-relevant could in fact be valuable work-related learning experiences for them.

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37. I offer Protégés constructive criticism if I believe their avoidance of problems and decisions is clearly limiting their work potential and/or career potential.

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38. I encourage Protégés to make well-informed and critically reflective personal choices as they plan their career experience, training, and educational goals.

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39. I explore with Protégés who express a lack of confidence in themselves the ways in which their own life experiences might be a valuable resource to help them devise strategies to succeed within the workplace environment.

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40. I assist Protégés in using facts to carefully map out realistic step-by-step strategies to achieve their career, training, and educational goals.

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41. I share my views and feelings when they are relevant to the work-related situations and issues I am discussing with Protégés.

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42. I listen to criticism from Protégés about work-related policies, regulations, requirements, and even colleagues without immediately attempting to offer justifications.

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43. I offer comments to Protégés about what appears to be their own inappropriate or ineffective behavior at work (based on their own explanations and descriptions) if I
have a reasonable expectation that they are prepared to work on positive change and will most likely experience some success as a result.

Never  Infrequently  Sometimes  Frequently  Always

44. I inform Protégés that they can discuss their “negative” emotions relevant to the workplace (such as anxiety, self-doubt, fear, and anger) in our meetings.

Never  Infrequently  Sometimes  Frequently  Always

45. I express confidence in Protégés’ abilities to achieve their career-related educational and training goals, especially when they are having personal difficulties in fulfilling their educational responsibilities due to pressure from work, family, or social relationships.

Never  Infrequently  Sometimes  Frequently  Always

46. I question Protégés’ decisions and actions regarding past and current work-related issues and problems when they do not appear to have formulated and/or implemented appropriate solutions.

Never  Infrequently  Sometimes  Frequently  Always

47. I discuss the positive and negative feelings Protégés have about their abilities to succeed in their careers.

Never  Infrequently  Sometimes  Frequently  Always

48. I offer as few carefully chosen criticisms as possible when I try to get Protégés to understand the (often difficult to accept) connection between their own self-limiting (defeating) behaviors and their inability to solve a particular work-related problem.

Never  Infrequently  Sometimes  Frequently  Always

49. I ask probing questions that require more than a “yes” or “no” answer so that Protégés will explain (in some detail) their views regarding their career plans and progress.

Never  Infrequently  Sometimes  Frequently  Always

50. I explore with Protégés the extent of their commitment (such as willingness to spend time and energy as continuing adult learners in training, education, and job-related learning such as TQM) in achieving their career goals.

Never  Infrequently  Sometimes  Frequently  Always

51. I base the timing of my “confrontive” questions and comments to Protégés on my knowledge of their individual readiness (often related to the stage of our relationship) to benefit from discussions about clearly sensitive work-related issues.

Never  Infrequently  Sometimes  Frequently  Always

52. I discuss my role as a mentor with Protégés so that their individual expectations of me are appropriate and realistic.
53. I try to clarify the problems Protégés are explaining to me by verbally expressing my understanding of their feelings and then asking if my views are accurate.

| Never | Infrequently | Sometimes | Frequently | Always |
--- | --- | --- | --- | --- |

54. I ask Protégés to reflect on and explore the resources available (government-sponsored training and assistance, college courses and programs, community-based organizations and workshops, family and social relationships) to help them manage the change and stress in their lives more effectively while they pursue their career and educational goals.

| Never | Infrequently | Sometimes | Frequently | Always |
--- | --- | --- | --- | --- |

55. I emphasize to Protégés, especially those who appear uncertain about what to expect from our meetings, that one of my important objectives as a mentor is to be of assistance to them in their personal progress toward training, educational, and career goals.

| Never | Infrequently | Sometimes | Frequently | Always |
--- | --- | --- | --- | --- |
SIX BEHAVIORAL FUNCTIONS

Relationship Emphasis
Conveys through active, empathetic listening, a genuine understanding and acceptance of the protégé’s feelings.

Purpose
To create a psychological climate of trust which allows protégés to honestly share and reflect upon personal experiences in work and as an adult learner, both positive and negative.

Mentor Behaviors
- Practicing active, reflective listening (verbal and non-verbal reactions that signal real interest)
- Using open-ended questions related to protégé concerns about work and learning situations
- Providing descriptive feedback based on observations
- Using perception checks to ensure you understand your protégé’s feelings
- Offering non-judgmental sensitive responses to assist in clarification of emotional states and reactions

Information Emphasis
Directly requests detailed information from and offers specific suggestions to protégés about their plans and progress in achieving personal, educational, and career goals.

Purpose
To ensure that advice offered is based on accurate and sufficient knowledge of individual protégé.

Mentor Behaviors
- Asking questions aimed at getting factual understanding of present educational and career situation.
- Reviewing relevant background to develop a good personal profile of your protégé
- Asking probing questions that require concrete answers
- Restating to ensure accuracy and interpretive understanding
- Relying on facts as the integral component of the decision making process
Facilitative Focus
Guides protégé through a reasonably in-depth review of and exploration of their interests, abilities, ideas, and beliefs.

Purpose
To assist protégés in considering alternative views and opinions while reaching their own decisions about attainable personal, educational, and career objectives.

Mentor Behaviors
- Posing hypothetical questions to expand protégé's views
- Uncovering the underlying experiential and information basis for assumptions
- Presenting multiple viewpoints to generate a more in-depth analysis of decisions and options
- Examining the seriousness of commitment to goals
- Analyzing reasons for current pursuits
- Reviewing recreational and vocational preferences

Confrontive Focus
Respectfully challenges protégé's explanations for or avoidance of decisions and actions relevant to their development.

Purpose
To help protégés gain insight into unproductive strategies and behaviors and to evaluate their need and capacity to change.

Mentor Behaviors
- Using probing questions to assess protégé readiness to benefit from different points of view
- Making open acknowledgement of concerns about possible negative consequences of constructive feedback on the relationship
- Focusing on the best strategies and behaviors to influence meaningful change
- Using the least amount of carefully stated feedback necessary for impact
- Offering comments, before and after confrontive remarks, to reinforce belief in positive potential for protégé growth beyond the current situation
Mentor Model
Shares life experiences and feelings as a “role model” with protégé in order to personalize and enrich the relationship.

Purpose
To motivate protégé to take necessary risks, to make decisions without certainty of successful result, and to overcome difficulties in the journey towards educational and career goals.

Mentor Behaviors
- Offering personal thoughts and genuine feelings to emphasize the value of learning from unsuccessful or difficult experiences
- Selecting related examples from your own life based on the motivational value
- Providing a direct, realistic assessment of the positive belief in the protégé’s ability to pursue attainable goals
- Expressing a confident view of appropriate risk taking as necessary for personal, educational, training, and career development
- Making statements that clearly encourage personal protégé actions to achieve stated objectives

Protégé Vision
Stimulates protégé’s critical thinking with regard to envisioning their own future and developing their personal and professional potential.

Purpose
To encourage protégés as they manage personal changes and take initiatives in their transition through life events as independent adult learners.

Mentor Behaviors
- Making statements that require reflection on present and future educational, training, and career attainment
- Asking questions that are aimed at clarifying perceptions (positive and negative) about personal ability to manage change
- Reviewing individual choices based on a reasonable assessment of options and resources
- Making comments directed at analysis of problem-solving and decision-making strategies
- Expressing confidence in carefully thought-out decisions
- Offering remarks that show respect for protégé’s capacity to determine their own future
- Encouraging protégés to develop their talents and pursue their dreams
SCORING INSTRUCTIONS

1. Score each question in the following way:
   a. Never = 1 point
   b. Infrequently = 2 points
   c. Sometimes = 3 points
   d. Frequently = 4 points
   e. Always = 5 points

2. Refer to the scoring sheet for the item statements on the scale (Items are identified with numbers), which are specifically listed under each of the six factors: Relationship Emphasis, Information Emphasis, Facilitative Focus, Confrontive Focus, Mentor Model, Protégé Vision.

3. Enter the point value (1 to 5 points) on the Points line, which is below the numbered Items. For example, using Factor 1: Relationship Emphasis, if you had circled "sometimes" for item statement #1, you would enter 3 on the scoring sheet.

4. After determining the total for each of the six separate factor scores, then total all of the six factor scores and enter this overall score at the bottom of the sheet on the Grand Total for Overall Score line.
## SCORING SHEET

**Factor 1: Relationship Emphasis**

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<tr>
<th>Item</th>
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**Factor 4: Confrontive Focus**

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**Factor 6: Protégé Vision**

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Grand Total for Overall Score: ___________________________
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PRESENTING YOUR ANNUAL WORK PLAN

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?)
APPENDIX
FMLP SELF-ASSESSMENT

Assess your skills in the facility manager competency areas and place a check mark in the box below your skill level. Use this information to select learning goals and opportunities in your individual development plan.

### I. Asset Management

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<td>C. Life Cycle Management</td>
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<td>C. Assessment and Innovation</td>
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<td>D. Human Resource Management</td>
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<td>E. Technology</td>
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### VI. Supervision, Management and Leadership

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<td>E.</td>
<td>Building Coalitions and Communications</td>
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IDP WORKSHEET DESCRIPTION

Goal
The competency that will be developed as a result of the developmental actions. Remember that the developmental goal should link to one of the NPS' Strategic Goals.

Developmental Action
The specific activities that the employee will engage in to achieve the IDP goal. Refer to pages 9 – 16 of this guide for examples of developmental activities.

Measure of Success
How the employee and supervisor will know when the employee has successfully achieved the goal. The performance measure that will indicate successful completion of the developmental action.

Resources Required
What is necessary for the employee to engage in the developmental action? Resources can include funds, work hours, other employees (e.g., subject matter/area expert), documentation and job aids, etc.

Manager/Supervisor's Role
What the supervisor will do to support the employee during this process. This support will always include regular feedback and encouragement.

Start/End Dates
The date that the developmental action will begin and end.

Strategic Goal
The NPS strategic goal that the development action supports. More than one strategic goal may be linked to the IDP Goal.
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<tr>
<td>B: Leading People</td>
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</tr>
</tbody>
</table>
# FMLP: AFMP INDIVIDUAL ORAL PRESENTATION RUBRIC

<table>
<thead>
<tr>
<th>Objective</th>
<th>Excellent</th>
<th>Fair</th>
<th>Needs Work</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thesis 10 points</strong></td>
<td>The presentation is clear, focused, and expresses a dynamic thesis. The listener's attention is held throughout.</td>
<td>The speaker is beginning to define the topic and suggest a main point; however, the development is still too basic or general.</td>
<td>The presentation has no clear sense of purpose or central point.</td>
<td></td>
</tr>
<tr>
<td><strong>Organization 10 points</strong></td>
<td>The speaker presents information in logical, interesting sequence. The opening and closing remarks are engaging and appropriately set the mood for the presentation.</td>
<td>The speaker presents information in logical sequence but with some confusing transitions. The speaker delivers adequate opening and closing remarks.</td>
<td>The presentation lacks a logical progression of ideas.</td>
<td></td>
</tr>
<tr>
<td><strong>Support and Evidence 25 points</strong></td>
<td>The speaker demonstrates thorough knowledge (more than required) by answering questions with explanations and elaborations. Anecdotes and details are employed, are relevant, and enrich the theme.</td>
<td>The speaker can answer basic questions regarding the topic but fails to elaborate. Some support for ideas is offered, but it is unclear how evidence and details are specifically linked to claims/ideas.</td>
<td>The speaker does not display clear introductory or closing remarks.</td>
<td></td>
</tr>
<tr>
<td><strong>Graphics and Audio-Visual Use 10 points</strong></td>
<td>The speaker's graphics explain and reinforce screen text and presentation. The AV adds interest and enhances understanding of the presentation in general.</td>
<td>The speaker occasionally uses graphics and AV that closely relate to text and presentation.</td>
<td>The speaker does not have a grasp of information and/or cannot answer questions about subject. The presentation makes claims for which no evidence is provided lists evidence without connecting these details to specific claims.</td>
<td></td>
</tr>
<tr>
<td><strong>Pacing 10 points</strong></td>
<td>Delivery is well patterned and natural, and student meets apportioned time interval.</td>
<td>The speaker's pace of delivery is satisfactory but does not meet apportioned time interval, or,</td>
<td>The speaker uses superfluous graphics or no graphics.</td>
<td></td>
</tr>
<tr>
<td>Score</td>
<td>Description</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>-------</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
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<td></td>
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<tr>
<td></td>
<td>Presentation fills the apportioned time interval, but the pace of delivery is either too slow or too fast.</td>
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<tr>
<td></td>
<td>• The speaker’s movements seem natural and reinforce the spoken message.</td>
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<tr>
<td></td>
<td>• S/he holds the attention of the entire audience through the use of direct eye contact.</td>
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<td></td>
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<tr>
<td></td>
<td>• The speaker made movements and gestures that enhances articulation, and s/he maintains occasional eye contact with audience.</td>
<td></td>
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<tr>
<td></td>
<td>• The speaker’s pace of delivery is either too quick or too slow and does not meet apportioned time interval.</td>
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<tr>
<td>10</td>
<td><strong>Body Language</strong></td>
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<tr>
<td></td>
<td><strong>10 points</strong></td>
<td></td>
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<tr>
<td>25</td>
<td>• Dynamic volume, articulation, and inflection make the speech natural while maintaining audience interest.</td>
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<td></td>
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<tr>
<td></td>
<td>• The speaker appears relaxed and self-confident and does not show evidence of mistakes.</td>
<td></td>
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<tr>
<td></td>
<td>• Volume, articulation, and inflection are adequate, but delivery lacks naturalness.</td>
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<tr>
<td></td>
<td>• The speaker makes minor mistakes, but quickly recovers from them; s/he displays little or no tension.</td>
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<tr>
<td></td>
<td>• The speaker utilizes movements or descriptive gestures or repetitive distracting movements/gestures.</td>
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<tr>
<td></td>
<td>• No eye contact with audience was maintained.</td>
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</tr>
</tbody>
</table>

**Evaluator Comments:**

Adapted from Northwest Regional Educational Laboratory, http://www.nwrel.org/
# API FACILITATION RUBRIC

## Name:  

## Date:  

### Title/Type of Work:  Group API Facilitation

<table>
<thead>
<tr>
<th>Objective</th>
<th>Good 10</th>
<th>Fair 7</th>
<th>Poor 5</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clear Idea/Specific Point</strong></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>- The presentation is clear, focused, and expresses a relevant thesis</td>
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</tr>
<tr>
<td><strong>Subject Knowledge / Evidence</strong></td>
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</tr>
<tr>
<td>- Students demonstrate full knowledge by answering all questions with explanations and elaborations.</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>- Anecdotes and details are employed, are relevant, and clarify the theme.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Organization</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Students present information in logical, interesting sequence which aids in audience comprehension.</td>
<td></td>
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</tr>
<tr>
<td><strong>Audience Engagement / Communication</strong></td>
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<tr>
<td>- Students demonstrate having considered the needs/ wants of the audience by directly addressing those needs.</td>
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<tr>
<td>- Explanations are appropriate for a lay-audience</td>
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</tr>
<tr>
<td><strong>Persuasiveness</strong></td>
<td></td>
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</tr>
<tr>
<td>- Students have explained the value of the API to the park as a whole and my division in particular</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>- Students attempt to establish buy-in to the API score</td>
<td></td>
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</tr>
</tbody>
</table>

| Total | 50 |

## Evaluator Comments:
# FMLP: AFMP GROUP PRESENTATION

## RUBRIC-AWP CRITICAL ANALYSIS

<table>
<thead>
<tr>
<th>Objective</th>
<th>Excellent</th>
<th>Fair</th>
<th>Needs Work</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thesis</strong> 5 points</td>
<td>• The presentation is clear, focused, and expresses a dynamic thesis</td>
<td>• The speakers are beginning to define the topic and suggest a main point; however, the development is still too basic or general.</td>
<td>• The presentation has no clear sense of purpose or central point.</td>
</tr>
<tr>
<td><strong>Organization</strong> 10 points</td>
<td>• The speakers present information in logical, interesting sequence.</td>
<td>• The speaker presents information in logical sequence but with some confusing transitions.</td>
<td>• The presentation lacks a logical progression of ideas.</td>
</tr>
<tr>
<td>• The opening and closing remarks are engaging and appropriately set the mood for the presentation.</td>
<td>• The speaker delivers adequate opening and closing remarks.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The speakers each take an equal division of presenting.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Support and Evidence</strong> 15 points</td>
<td>• The speakers demonstrate thorough knowledge (more than required) by answering questions with explanations and elaborations.</td>
<td>• The speakers can answer basic questions regarding the topic but fails to elaborate.</td>
<td>• The speakers do not display clear introductory or closing remarks.</td>
</tr>
<tr>
<td>• Anecdotes and details are employed, are relevant, and enrich the theme.</td>
<td>• Some support for ideas is offered, but it is unclear how evidence and details are specifically linked to claims/ideas.</td>
<td>• The speakers do not use supporting documents to support their claims</td>
<td></td>
</tr>
<tr>
<td>• The speakers use various sources (PAMP, Project List, Prior year AWP) to draw from on their analysis.</td>
<td>• The speakers draw from some but not all documents.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pacing</strong> 5 points</td>
<td>• Delivery is well patterned and natural, and student meets apportioned time interval.</td>
<td>• The speaker's pace of delivery is satisfactory but does not meet apportioned time interval, or, presentation fills the apportioned time interval, but the pace of delivery is either too slow or too fast.</td>
<td>• The speakers' pace of delivery is either too quick or too slow and does not meet apportioned time interval.</td>
</tr>
<tr>
<td><strong>Body Language</strong> 5 points</td>
<td>• The speakers' movements seem natural and reinforce the spoken message.</td>
<td>• The speakers made movements and gestures that enhances articulation, and they</td>
<td>• The speakers do not meet the audience's eyes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The speakers do not meet the audience's eyes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The speaker seems</td>
<td></td>
</tr>
</tbody>
</table>
## Delivery 10 points

<table>
<thead>
<tr>
<th>Point</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dynamic volume, articulation, and inflection make the speech natural while maintaining audience interest.</td>
</tr>
<tr>
<td>2</td>
<td>The speaker appears relaxed and self-confident and does not show evidence of mistakes.</td>
</tr>
<tr>
<td>3</td>
<td>Volume, articulation, and inflection are adequate, but delivery lacks naturalness. The speaker makes minor mistakes, but quickly recovers from them; s/he displays little or no tension.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Point</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Volume, articulation, and inflection are inadequate. Frequent mistakes were made in presenting. Speakers appear as if they did not prepare for the presentation.</td>
</tr>
</tbody>
</table>

**Total** /50

Adapted from Northwest Regional Educational Laboratory, [http://www.nwrel.org/](http://www.nwrel.org/)

**Evaluator Comments:**
Facility Management Scenario - Accessibility

The Scene:
Sea Otter Island has two campgrounds, East and West. East Campground is smaller, but used a lot more since it is on the inland side of the island with better weather, and the marina is nearby. West Campground is larger, but not used much because the winds from the ocean make for a tougher environment. It is newly discovered that the West Campground sits on a site that is significant to the native Americans in the area. Due to the low visitor use of the campground, the site is scheduled to close permanently.

But wait! The West Campground contains three accessible camping units. The East Campground currently contains no accessible features. Accessibility upgrades to East Campground are included in SEOT’s transition plan, but construction is not scheduled until FY2020.

Considerations:
Can the West Campground really be closed if it is the only location providing features of accessibility?

What steps would you take to ensure that the population of visitors with disabilities is not denied participation in the camping programs at SEOT?

Where can you find the scoping and technical specifications for accessible camping facilities?