**Elective Offerings
September 8 – 12, 2019**

**Monday, September 9, 2019
1:00 pm – 2:40 pm**

**532: Preventative/Predictive Maintenance Systems** A comprehensive maintenance program relies on an effective approach to preventive and predictive maintenance. This session will address the key elements in establishing a preventive maintenance program and explore the challenges and benefits of sustaining the program.
*Faculty Member: Chris Smeds*

**547: New & Emerging Products/Materials for Building Design**This class will focus on new and emerging products and materials suitable for use in the construction of higher education facilities.  We live in an age where products are being developed at an exponential rate.  It is important to keep up to date with new developments.   Come see some new and interesting building products and materials. We will also identify some poor performing products as well as some “tried and true” building materials.
*Faculty Member: Joel Sims*

**554: Thought Leaders**The landscape of higher education is changing at a pace that makes it challenging to keep up with the potential impacts on the facilities management world. The Thought Leaders Series from APPA can help prepare the facilities manager for the new challenges. This session will explore the recent driving forces impacting higher education and the resulting changes that will modify the way we do business. Recent monograph topics will be explored and issues identified that will be critical to the facility manager. Methods that the facility manager can use to gain a seat at the decision making table will utilize strategies and provocative questions to promote the discussions on campus.
*Faculty Member: Keith Woodward*

**563: Managing Project Scope, Schedule & Budget**The interaction of scope, schedule and budget impacts many of our project, maintenance, and operations activities.  This class explores each of these elements individually and seeks to understand the relationship among them as key drivers in our daily work.  Attendees will engage in discussion and small group exercises in order to highlight the continuing tension among these elements and the need to keep them in balance.
*Faculty Member: Michael Carmagnola*

**589:  *Everything You Need and Want to Know About APPA’s Credentialing Program (1:00pm – 4:50pm) DO NOT PICK A 3:10 Elective on MONDAY IF YOU CHOOSE THIS CLASS.***This comprehensive APPA Credentialing elective is designed to showcase all the preparatory materials available to you on APPA’s Customized Interactive Learning (CIL) portal.  If you are interested in attaining your CEFP credential for one or more of your institution's staff members or yourself, this course will allow you to ask questions and get a very deep understanding of the following:

What is the CEFP and is it right for me?  What are the steps I must take to attain my credential and what resources does APPA provide? Why is attaining my credential so important to my professional development growth?

The second half of the course is a deeper dive into the specifics of our online Customized Interactive Learning (CIL) portal.

 The CIL includes the following resources that will be explored in depth:

•         All four core areas of the APPA Body of Knowledge

•         Flashcards

•         Practice exams

•         Four core area quizzes and knowledge checks

•         CEFP study guide

•         Facilitated live and archived webinars

*Faculty Member: Christina Hills*

**606: Calculating Energy Usage & Savings**In this session, participants will learn about different International Performance Measurement and Verification Protocol (IPMVP) methodologies to measure, estimate and forecast energy usage, including computer modeling.  Attendees who work in all areas of FM will benefit from this class, learning about the quantifying measures behind one of FMs largest expense categories.  This information is particularly useful to those who work in business and finance, related to utility billing, calculating conservation programs paybacks and performance contracting.*Faculty Member: Larry Schuster*

**608: Overview of Building Codes**Facilities managers are responsible for operating code compliant facilities – but much is open to interpretation.  This course will address the importance of understanding building codes in educational settings, both in new construction and in existing facilities.  Discuss which codes apply, understand the role of the code official, and learn how you can be involved in code advocacy.*Faculty Member: Alan Sactor*

**622: The Five Generation Workplace**
Right now there are five generations in the workplace, each with a different set of values and communication styles. At a time where the nation is facing a talent shortage, particularly in areas of skilled trades, how do facility organizations successfully assimilate each generation in order to increase employee engagement and retention.
*Faculty Member: Jamie Gayer*

**Monday, September 9, 2019
3:10 pm – 4:50 pm**

**520: Project Management**
Project management isn't just about construction but is useful in any project that you are doing. This class will provide an overview of the five process groups of Project Management - initiating, planning, executing, controlling, and closing - and the project manager's roles and responsibilities.

*Faculty Member: Mary Vosevich*

**559: Sustainable O&M Programs**This course will provide an overview of O&M programs that are striving to be sustainable. This interactive session will explore what sustainability means to facilities managers, review the many questions and challenges presented by sustainability, as well as share practical success stories from around the country.  Topics will include how campuses are structuring their sustainable O&M programs, current trends & new initiatives in waste management, water & energy conservation, tree & turf care, green cleaning, pest control, and more.  The session will also look at developing appropriate metrics and how to effectively use them in related outreach programs.
*Faculty Member: Ed von Bleichert*

**545: Designing for Maintainability**
Discuss procedures to assure that institutions achieve the best overall value from their investment in new or renovated facilities. Understand the balance between aesthetics and durability and how they both play an important role in design. Discuss the evaluation of facility designs based on life cycle costs and learn the questions to ask during the design process so that you help create an overall better product.
*Faculty Member: Joel Sims*

**546: Design Standards**Learn how to communicate to the design consultant your campus needs in a new or renovated building. Review how to develop a set of institutional guidelines and standards for design consultants to utilize in the design of a campus project and how to contractually bind the consultant to your guidelines and standards. Discuss how to create feedback loops, for revisions to the standards, from the maintenance and custodial organizations and other stakeholders.

*Faculty Member: Steve Thweatt*

**601: How to Negotiate with Anyone**All of us negotiate all the time.  Negotiation can be viewed as a game with predictable activities, players and rules.  This session will discuss the various styles of negotiation and when to use them.  Through classroom activities learn your type of negotiating style.*Faculty Member: Bill Harris*

**612: TCO**This course will provide a discussion of total cost of ownership and how it applies to higher education facilities.  The focus will be on survey results, real life application, and how to implement in higher education facility settings.  Discussions will include challenges and opportunities.*Faculty Member: Ana Thiemer*

**628: Data, Dashboards, and Decisions**One university’s experience utilizing business intelligent software to access and assimilate facilities data from multiple systems/platforms.  This integration is providing useful analytics leading to informed decision making and better resource management.
*Faculty Member: Joe Whitefield*

**Tuesday, September 10, 2019
1:00 pm – 2:40 pm**

**518: The Manager as Coach**
Coaching is experiencing dramatic growth as a valuable management tool for managers and supervisors. You will sharpen your communication and management skills as you integrate the coaching examples, skill-building exercises, and coaching tips and traps into a positive approach with your employees. Coaching is applicable in all areas of management but is especially valuable in evaluations, discipline, positive and negative feedback, and career development.

*Faculty Member: Michelle Frederick***531: Customer Service**
Effective customer communication is essential for a successful facilities management organization. Discuss who the customers are, how we understand their expectations, and the steps we take to meet those expectations. Explore customer surveys, communication methods, training in customer service, and the ways to market the facilities organization.
*Faculty Member: Polly Pinney*

## **536 - “Best Practices” for Plant Organization & Operations (see 315)**

This session will examine “best practices” related to procuring, generating, and distributing utilities. The session will begin with a review of all activities necessary for successful plant operation. It will then focus in on a few effective strategies for dealing with recent challenges in the utilities environment. This class will utilize a big picture approach to best plant practices, including using Standard Operating Procedures to capture every required in a utility plant as well as assigning responsibilities. This concept could be applied in other areas of facilities management. *Faculty Member: Jeff Zumwalt*

**541: In-House Construction Services**
Discuss effective processes and procedures for providing in-house construction services.  Review staffing and organization, workload management and leveling, budgeting, recharge rate structures, billing procedures, and productivity and incentives to perform.
*Faculty Member: Mark Stanis*

 **558: Metrics, Informatics & Performance**Modern facilities organizations are awash in a sea of data – from financial to work management, geospatial to building controls, organizations are collecting vast amounts of data. Too often, however, organizations simply use that data as a record of past outcomes rather than as a tool that supports forward-looking organizational decision making. This session will discuss how organizations can address this issue and begin to effectively use their data. Topics will include data, metrics, KPIs, benchmarking (including APPA’s Facilities Performance Indicators) and APPA’s newly launched initiative on Facilities Informatics.
*Faculty Member: Chris Smeds* **600: The Legal and Ethical Aspects of Purchasing**
This session will examine legal and ethical concepts as they apply to the purchasing of goods and services in higher education.  All organizational employees with purchasing authority should understand their legal responsibilities.  The session will discuss various ethical dilemmas that can occur in the purchasing process and how to avoid them.

*Faculty Member: Bill Harris*

 **625: Managing Effective Plan Reviews**Have you ever wondered how to manage an effective plan review or asked what makes it so hard?  Come participated in a discussion regarding effective plan reviews.  Learn how to manage the plan review process well to reach the goals you have for your project.  You’ll hear about challenges and opportunities each project has and learn how items such as an invitation list, industry tools (paper and/or electronic), scheduling and timing of reviews, campus standards and expertise needed all play a part in an effective plan review.
*Faculty Members: Sadie Greiner and Jeff Gee*

**Tuesday, September 10, 2019
3:10 pm – 4:50 pm**

**548 - Facilities Design for Future Technologies**
Discuss the technical parameters of the learning environments of the 21st Century Campus. Learn the basic principles of designing learning spaces for multimedia presentation, videoconferencing, and networked instruction. Understand how these basic principles can be successfully applied to a variety of project types, including labs, classrooms, and the new breed of flexible learning spaces. (Recommended prerequisite: 455 Emerging Technologies and the 21st Century).
*Faculty Member: Mark Valenti and John Cook*

**561 - Introduction to Blueprint Reading** This hands-on fundamentals course is designed for individuals in facilities administration and operations who are responsible for reviewing design drawings for campus projects. Learn the techniques for reviewing and interpreting plans and elevations by envisioning three-dimensional space from a two-dimension representation. Review how architectural and engineering drawings, better known as "blue prints", once reproduced for review, are structured, layered, detailed, cross- referenced and more.
*Faculty Member: Sadie Greiner*

**580: Public Speaking and Making Presentations**Public speaking can present a challenge for many people. “What if I mess up during my presentation? What if the audience doesn’t like my presentation? What if I forget a part of my presentation? What if I look nervous during my presentation?” Sometimes, employees bypass promotions, and business owners bypass business opportunities rather than give a presentation. Learn how to develop a speaker’s mindset, overcome anxiety, gain outstanding presentation skills, and become more confident making presentations that achieve results in this interactive class.
*Faculty Member: Steve Thweatt***581 - Fire & Life Safety Systems**
This presentation will describe fire detection and suppression systems, exit and emergency lighting systems, and other fire and life safety systems as related to educational facilities. Discussions will emphasize installation, modernization, codes, testing, and inspection.
*Faculty Member: Mike Halligan*

**603 - Panel Discussion: Emerging Trends in Operations & Maintenance**This interactive panel discussion will provide attendees an opportunity to discuss emerging trends in Operations and Maintenance with a faculty panel. Come prepared with questions and/or topics of interest you would like to discuss!
*Faculty members: Chris Smeds, Ana Thiemer, Mark Stanis, Ed Von Bleichert*

**614: 7 Management Sins**This course will help managers to avoid committing one of the seven “sins” that lead to the most serious consequences in the employment setting. An employer’s best defense in avoiding employment lawsuits and minimizing costs to defend lawsuits in the competency of the employer’s mangers. We will discuss ways to avoid making mistakes and decrease the chance of a lawsuit and increase your ability to defend those lawsuits that are filed.
*Faculty Member: Jean Brannon*

**629: Utility Public Private Partnerships**
This class will provide an introduction into the new partnerships being created between public and private entities, particularly in the utilities arena.  An overview of P3 concepts will be provided as well as a look at the types of agreements and arrangements that are being considered across the industry.
*Faculty Member:  Brett Garret*

**Thursday, September 12, 2019
1:00 pm – 2:40 pm**

## **513 - Maintaining Historic Properties**Many higher education campuses have facilities designated as historic property.  Using these facilities efficiently, while preserving their historic character can be challenging. This elective course will include such topics as non-invasive maintenance practices, artisan training, preservation techniques, and the value of research. *Faculty Member: Mark Stanis*

## **521 - APPA 101 & Credentialing**

Do you want to be perceived and recognized as a professional in the field of educational facilities management?  APPA is the gathering place for those of us engaged in the field of educational facilities management and dedicated to the ongoing evolution of its professionals into influential leaders in education. This course will introduce you to APPA’s outstanding programs and offerings.  It will also discuss APPA’s highly sought after credentialing program that includes the Certified Educational Facilities Professional (CEFP) credential. *Faculty Member: Christina Hills*

**530 - Information Technology in FM**Information technology plays a critical role in the day-to-day operation of a Facilities Management organization. This course will provide a discussion of how FM organizations can leverage information technology to improve the effectiveness and efficiency of their organizations. Topics discussed include work management systems, analytics and reporting, and mobile technology.

*Faculty Member: Chris Smeds*

## **552 - Challenging Personnel: What to Do?** This class discusses the 10 categories of “difficult” people, looking at reasons why they are the way they are and provides some strategies for working with each group. Relates to the “whys” of decision-making or actions. *Faculty Member: Lynne Finn***573 - Disaster Prep & Business Continuity for Tele and IT**

This session will explore issues, challenges and considerations needed to develop a business continuity and disaster recovery plan for telecommunication and information systems. This session will examine key components of a business continuity plan from risk assessment to risk mitigation. Participants will examine various risk scenarios and examine response options that can be used to develop recovery plans.
Faculty Member: Craig Klimczak

**609 - Transformational Changes in Facilities Management**The education facilities management profession is finding itself increasingly immersed in a sea of transformational change. In an era that has been termed the “Age of Accelerations,” impactful forces are changing the profession in dramatic ways as it relates to Finances, Technology, Demographics and Communications. A panel of Institute faculty will share their view of the not-so-distance future and discuss with attendees how to best position ourselves to embrace the changes that are bearing down upon us.
*Faculty Members: Lander Medlin & Don Guckert*

**616 - Competing Perspectives in Delivering Projects**Successful project delivery usually requires an effective balancing of the needs and requirements of a variety of stakeholders – financial, user, operational, and political.  This interactive presentation will address identifying the list of stakeholders, how to include them in the planning and programming phases, and strategizing ways to assure the scope of a project addresses everyone’s needs from the stakeholders to the owner.  Through audience participation, we will address issues such as determining ongoing operating expense prior to and during design, negotiating design guidelines vs. user custom requirements, programming for future change, effective community communications, and the responsibility for assuring the facility is both economically and operationally sustainable.

*Faculty Members: Jay Klingel & Joe Bilotta*

**Thursday, September 12, 2019
3:10 pm – 4:50 pm**

**510 - Personal Enrichment – Preparing for Career Advancement in Facilities**A group of Institute faculty who are current or former senior facilities officers will offer their advice on what actions and preparations attendees can take to pursue progressive career paths in the profession. Questions related to education, professional development, leadership development, credentialing, APPA engagement, networking, working across organizational boundaries, serving leadership and colleagues, and other career building topics will be covered.

All attendees should be prepared to engage in active conversation. To encourage a high level of participation among attendees, class sizes will be limited to between 25 and 30 individuals.
*Faculty Members: Panel of Senior Facilities Officers*

 **515 - Business Communications**
Learn the elements of effective written and oral communication. Class addresses style, audience analysis, format, presentation and delivery. Effective communication strategies for presentation and delivery. Effective communication strategies for professional settings will be discussed. Learn the difference between 'your need to tell' and 'your audiences' need to know'.
*Faculty Member: Mary Vosevich*

**524 - Creating a Learning Environment in Facilities**With budgets being cut and employees being expected to do more with less, organizations are having to find effective and inexpensive ways to develop employees and prepare them for new roles. This session will explore a variety of creative and cost-effective programs to create a learning environment where staff are expected to learn and grow.  This session will explore all the ways to develop staff and share the success stories of the program in preparing the organization for the future.
*Faculty Member: Michelle Frederick*

**535 - Building Automation Systems**This course will provide an overview of a Building Automation System (BAS) utilized to monitor and control typical building HVAC systems.  The course will cover typical architecture for web-based systems, industry terms, types of systems, system components, and communication protocols.  Discussions will include the benefits and effective uses of BAS systems for facilities managers related to energy conservation and customer service as well as future trends in the industry.

*Faculty Member: Allen Boyette*

**562 - Planning the Campus Environment**Careful attention to the development of the campus physical environment is essential to the support and success of a college or university mission. Get an understanding of the variety of issues and numerous components that make up our campus environment. Define the campus infrastructure; determine what it includes and how it impacts students, faculty, staff, visitors and the community. Discuss basic principles for the effective planning of open space, buildings, circulation, parking, landscape, utilities, signage, lighting, waste disposal, arts, accessibility, etc. Learn concepts for the development of both the physical boundaries and the relationships between campus and the community. Discuss ways in which we can integrate campus programmatic needs with the physical plans that create a positive and successful campus environment.
*Faculty Member: Joe Bilotta*

**571 - Introduction in Facilities Networking**This session will introduce participants to the world of connectivity and possibilities of networking in facilities management and specifically in the energy and utilities arena.  The basics of a university networking backbone will be explained as well as how different systems connect and use a campus network to facilitate systems and web access.
Faculty Member: Craig Klimczak

**579 - Experience Exchange: “Getting The Most Out of Your Maintenance Management System”**This experience exchange session will focus on how FM organizations can effectively utilize their Computerized Maintenance Management Systems (CMMS) to deliver business value for their organization. Discussion topics will consist of best practices, using data for reporting and analytics, business process and workflow optimization, lessons learned and strategies to ensure that organizations get the most out of their CMMS.Faculty Member: Chris Smeds