

HISTORY *and the* FUTURE

by Wallace G. Glasscock

“Supervisor’s Toolkit was a big success in our department and helped with team building and general tools to help our supervisors succeed. One thing that I would do in the future is involve the area managers alongside the supervisors. The front-line supervisors felt that there were lessons to be learned that their manager should be employing as well.”

—Robert Quirk, Director of Facilities Management,
California State University Long Beach

When APPA asked seven volunteers to meet and form a committee in July 2001 in Montreal, Canada to discuss the development of a facility-based training and development program for supervisors, no one could have predicted the impact it would have. The results of the final product continue to be felt in many colleges and universities today and will be a positive influence in the

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future. The initial group included facility directors, front-line supervisors, training managers, and human resource personnel. Each brought his or her own ideas of what should be included in a training and development program for facility supervisors.

Many hours of discussion and work were invested before the final product, *Supervisor’s Toolkit: Nuts and Bolts of Facilities Supervision*, was introduced to the APPA membership. Prior to introducing the Toolkit as a professional training program, three pilot programs were conducted at three colleges and universities to evaluate the content and presentation style of the program. Members of the committee conducted the field tests, and that experience, coupled with the written evaluations, helped us accomplish a final rewrite of the Toolkit before it was presented to the APPA organization. The first official training program was conducted in Indian Wells, California in tandem with the APPA Institute for Facilities Management on September 14-18, 2003.

The Toolkit committee members and APPA staff continued to evaluate the program, rewrote portions, added new and creative material, and eliminated those parts of the program that did not work as originally intended. The revised program changes were being introduced and evaluated at the APPA

Institute in Norfolk, Virginia in September 2005, as well as at the International Sanitary Supply Association conference in Las Vegas, Nevada in October. The final changes to the program will be added to the Toolkit in January 2006. (Please see the May/June 2003 issue of *Facilities Manager* for all the information on the development, testing, and publication of the Toolkit program.)

The Product

Supervisor's Toolkit has surpassed the goals that were originally set by all who were involved in its development. Sam Polk, director of facilities management at Tennessee State University and APPA's Vice President for Educational Programs, offered the following comment about Toolkit:

"You can't expect maintenance staff and maintenance supervisors to be effective without having appropriate hand and power tools. Likewise, they won't be effective leaders without the knowledge contained in the Supervisor's Toolkit. Along with the proper craftsman's tools, the Supervisor's Toolkit provides the nuts and bolts the supervisor needs. As Vice President for Educational Programs, I am delighted that many APPA institutions and regions are taking advantage of this outstanding program."

Although originally designed for front-line supervisors, Toolkit has enjoyed high ratings from managers who have attended the program. It has developed into a "must attend" for anyone in a leadership role in a facilities organization. Most of those who have attended the weeklong program will testify that they not only understand their position in facilities with more clarity but also relate to the responsibilities of all levels of management in facilities. Newly acquired skills have made their job easier and they have become more productive in the process. The uniqueness of the program, when compared to some of the "traditional" management training programs, is that Toolkit is about facilities and the issues, challenges, and opportunities that exist in every facility organization.

The Master Trainers selected by APPA to lead Toolkit training brought many years of training experience to the program. All were involved in facilities and could relate to the issues that are present in a facility organization. These Trainers teach at every APPA Institute and conducted all of the programs during the introduction of Toolkit. Each of these individuals was involved in the writing, development, and testing of Toolkit. All continue to be involved in the program. The Toolkit Master Trainers are Michelle Estep-Frederick, Wally Glasscock, Carol Trexler, and Nancy Yeroshefsky.

Colleges, universities, and other educational organizations can also certify individuals in their facilities to become Certi-

fied Trainers for Toolkit. The facility trainers must attend a Toolkit training program conducted by two Master Trainers. They would participate in the program and observe how Toolkit is presented. The facility would apply to APPA for a license to conduct Toolkit and the trainer(s) would submit a resume for evaluation. Once the resume and license are approved, the facility can move forward with dates for training. A leader's guide, workbooks for participants, a disk including PowerPoint presentation, and additional training materials will be sent to the facility. A representative of APPA will travel to the campus and observe at least one day of the first program conducted. The trainers, now certified to teach Toolkit, can conduct future Toolkit programs at their facility.

Policies and procedures on how to become a Certified Trainer can be obtained by contacting APPA.

The program has been successful, but like all programs, constant evaluation is

necessary to assure continued success. Although recent modifications will be noticeable at the January 2006 Toolkit offering, the basic program will remain the same. The modules will be similar to the original Toolkit.

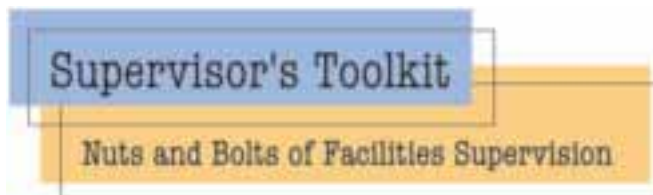
- Module 1:** Supervision, What is it?
- Module 2:** It's More than Administration
- Module 3:** Communication, Let's Talk
- Module 4:** If It Weren't for the People (relationship with others)
- Module 5:** Motivation and Performance
- Module 6:** Customer Service Triangle
- Module 7:** Supervisors as Leaders
- Module 8:** Synthesis—Teams and Tools (putting it all together)

Several colleges and universities have sent their department trainers to a Toolkit program conducted by Master Trainers. Ohio State University has taken this approach and has certified three trainers. They conducted Toolkit for the third time in late 2005. James E. Dertinger, coordinator of education and safety programs at Ohio State, offered the following about Toolkit:

"Our team has presented Toolkit two times at Ohio State and we continue to receive very positive feedback, from not only our Physical Facilities participants, but also from several other university departments that participate in our program."

Purdue University, due to a large staff, also certified three trainers to conduct Toolkit. They recently offered Toolkit for the second time. They have included other departments in the

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training such as the Campus Police. Bob Beck, Purdue's training manager for physical facilities, stated:

"Feedback on Toolkit was very positive, especially considering it was the first time the program had been delivered at Purdue. Based on the feedback and the quality of the content we will be offering it again in late October and early November for another 24 of our supervisors. Current plans are to continue the series as long as demand exists."

One advantage to the approach taken by Purdue and Ohio State is that training time can be expanded to accommodate the work schedule of the supervisors. This allows development of a training schedule with the flexibility to schedule one or two modules a week.

More than a dozen trainers have attended a Toolkit training program conducted by Master Trainers, and they have completed the steps necessary to become a Certified Trainer for Toolkit. Several additional trainers have request information indicating an interest in becoming Certified Trainers.

While some of the larger facility organizations continue to conduct Toolkit a second or third time, others have hosted programs to allow training of smaller staffs. One of these, Bernie Beyer, operations manager at John Carroll University, Cleveland Ohio, hosted two Toolkit training programs. These have been conducted at John Carroll's campus during spring break at his campus the last two years. Beyer sent out flyers to facility directors within driving distance of his campus and recruited individual from those campuses. This worked well and allowed sharing of many campuses experience with his supervisory personnel during the weeks of training.

San Diego State University, the University of Nevada Reno, as well as many schools in the Central and Rocky Mountain regions have followed a similar format by opening up Toolkit to facilities from other colleges and universities in their area. This has allowed colleges and universities with smaller staffs to participate in Toolkit and provide professional development for their supervisory personnel.

APPA's Rocky Mountain and Central regions selected trainers from their region and provided the opportunity for them to become certified to conduct Toolkit. These Certified Trainers travel to various locations in the region to conduct the Toolkit program. This has provided the opportunity for facility directors, who are members of APPA, an avenue to train and develop their supervisory staff. Plans are to continue this training program into the future. The trainers are supported by their administration with the time and expenses to offer the training. This approach has been well received in both regions and feedback on the training has been positive.

Training

When a facility department makes the decision to bring Toolkit to their campus, two Master Trainers conduct the training. The program is scheduled for five days and involves

training time of 34 to 36 hours. Some have scheduled training during down time around holidays or spring break. In some situations, as at John Carroll University, training has been scheduled on two occasions, allowing all supervisors to attend.

Adjustments can always be made to accommodate the facility organization. An excellent example of this is the schedule worked out for Memorial University, St. Johns Newfoundland. Training started at 8:30 a.m. and an extra 30 minutes was taken at lunch to allow supervisors time to check their shops before training started and check again at lunchtime. St. John's established this schedule to allow all of their supervisors to attend training.

Evaluations

Every session of Toolkit is evaluated at the end of the week of training. All evaluations have rated well above average, with some programs ranking above 90 percent. These evaluations, many of which offered positive critique about the program, have been included in the modification of Toolkit for 2006. Some comments are listed below from participants that have attended Toolkit.

Each time Toolkit is conducted the evaluations are sent to the APPA office for review. The evaluations are summarized and sent to the trainers that were responsible for conducting Toolkit and the information is shared with the Master Trainers as well as the APPA staff. Sponsors of each program receive the final evaluation report, and the evaluation forms are returned to the host for his or her information.

Selected comments offered by participants:

- By Friday afternoon, I felt that the training provided some practical tools for me to use everyday.
- I have attended other supervisory seminars that have given me some ideas & suggestions on how to improve, this was by far the best one that I have attended.
- Thank you for the information you gave us this week; This is one of the most participative groups I have ever worked with, excellent group of individuals, enjoyed my entire week.
- I came away with a better understanding of my job, lots of knowledge and humor and respect for each of us.
- Great experience, thanks for being helpful to me, you made the time interesting and informational.
- The week was informative and gave us some very good tools to handle most of the people—most of the time.
- For front-line supervisors the information is great—provides a basis for communication.
- Comprehensive, informative, fun, and interesting—excellent seminar/course.
- Program covered mostly everything—lots of very good information that supervisors can use during work—great program, lots of information.
- Very good program even for leader underneath supervisor in any institution.

- Hopefully, we can all leave with the positive attitude that was built this week.
- Excellent communication tool—it opened my eyes to a lot of things/practices I should change and ideas on how to go about it.
- Recommended for all new supervisors, very good program—I'm bringing back so many things on being an effective supervisor.
- Happy that I was given this opportunity for this program—I believe the entire package was very appropriate and helpful.
- Excellent program for frontline supervisors and group leaders.
- Great to have facilitators that speak our language—would make all supervisors understand their role as management.

Many comments have been offered about Toolkit, but the one positive comment that is heard most often is: *“Toolkit is different from other training programs as it relates directly to facilities. It reflects on everything we do daily. The exercises, language, and group work in the program are the same situations faced on the job by all supervisors and managers.”*

Toolkit offers training that is related to the world of work in a facility organization. This includes language, discipline, planning, organizing, directing, and controlling the daily workload, including the all-too-often communication breakdowns.

Attendance

As of October 2005, approximately 825 supervisors and managers have attended Toolkit training. If the field test participants are included, more than 900 facility personnel have attended a Toolkit program. These have been conducted by Master Trainers representing APPA or by Certified Trainers, authorized by APPA. The training has included five APPA Institutes and over 18 programs conducted by Master Trainers or Certified Trainers. In addition to these programs, Toolkit training was conducted at the International Sanitary Supply Association (ISSA/INTERCLEAN) conference in New Orleans in 2004 and again in Las Vegas, Nevada in October 2005. And the program continues to be offered on numerous college campuses.

The Future

In the introduction to the Supervisor's Toolkit program, supervision is defined as: “The process of working with and through people to achieve organizational objectives by means of effective decision making and coordination of available resources.” To achieve this in a training process Toolkit offers:

- A value-driven format, which offers a powerful development tool for the improvement of service quality and productivity.
- An ideal forum for transmitting organizational goals and objectives to the workforce.
- An environment designed to enable participants to formulate action plans for both practice and assignments and future on-the-job improvements.

Since its inception, Toolkit has become an integral part of APPA's training and development programs. It is anticipated that many will take advantage of the program in the years ahead. It has proven to be successful and as such, has become a required program for facility organizations. With the changes that occur in today's workforce, seemingly daily, Toolkit will be revised in the years ahead. This will be necessary to just stay even with the changes and challenges that are in the future of facilities.

For more information on Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision, visit www.appa.org/education/supervisors/toolkit/index.cfm or contact Holly Judd at the APPA office, 703-684-1446 ext. 234 or toolkit@appa.org.

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