

2017 Effective & Innovative Practices Award Application

Program Overview

The Office of Physical Plant (OPP) at The Pennsylvania State University respectfully submits its **APPA Credentialing Cohort Program** for consideration for the 2017 Effective & Innovative Practices Award.

The first iteration of this program was started in January 2014 and was comprised of a series of lunch-and-learn sessions that addressed APPA's Body of Knowledge through practice questions, flashcards, and group discussion. Three cohorts were educated through this approach.

With the implementation of the Customized Interactive Learning platform and online examination preparation by APPA, which includes a number of preparation concepts from the first iteration of the Penn State cohort approach, the **APPA Credentialing Cohort Program** now utilizes online and in-person preparation and discussion.

Introduced in August 2016 and facilitated by credentialed professional staff at Physical Plant working in the four core APPA content areas, the new iteration of the program not only prepares employees for the APPA examinations, but also includes review and discussion of both OPP and APPA policies, procedures, and best practices.

To date, the **Penn State APPA Credentialing Cohort Program** has educated 103 employees and successfully credentialed 91. Beyond that, the program has grown and strengthened a sense of camaraderie among the employees.

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Institutional Benefit

Penn State's Office of Physical Plant has a commitment to the training and development of its employees. The **Penn State APPA Credentialing Cohort Program** offers an exciting opportunity to promote the development of employees throughout the organization by providing a common platform of education and experience. There are many benefits, including:

- A large segment of our workforce (over 100 employees) have had the opportunity to advance their education and understanding of facilities management concepts. In many cases, they are learning about aspects of the industry that their current jobs and experience would otherwise not provide.
- Cohorts of 20-30 people navigate the process together and not only learn about facilities management, but get to know others in our nearly 1,400-person organization with whom they may not have the opportunity to interact on a regular basis.
- The recent inclusion of our technical service workforce in the program is helping to break down barriers between staff and technical workers. Working and learning together and having a common experience has been quite valuable.
- Starting in 2017, we will be offering the program to a group of our customers who interact with us frequently. These customers, who we call Facilities Coordinators, will participate alongside OPP employees. Not only will this increase their knowledge of facilities management in general, but it will help our customers understand how OPP works.
- We are confident that involving technical service employees and customers in the cohorts will enable these two groups to understand our operations and our organization better. Moreover, we feel this will promote a sense of inclusion and teamwork.

The substantial investment of resources to this program has significant benefit to the organization. Aside from the tangible benefits listed above, employees view the program as a demonstrated commitment to them by the institution. The goodwill this engenders is difficult to measure but should not be understated.

2017 Effective & Innovative Practices Award Application ***Innovativeness, Creativity, and Originality***

The **Penn State APPA Credentialing Cohort Program** is unique insofar as, to our knowledge, it is the only one in place at an APPA member institution on such a large and successful scale. Rather than simply encouraging employees to pursue credentialing on their own time and on their own dime, Penn State has developed a program that supports participants throughout the process and promotes organizational team building and understanding. The program's uniqueness, however, is not a detriment to its applicability at other institutions.

Team Building

When members of the cohort meet every week for ten weeks along with program facilitators, it brings people together who would not necessarily interact with one another. Learning what other people do in their jobs and why it is important, supporting your teammates with the coursework, getting to know people on a more personal level, and sharing a bonding experience helps our organization function better. In a large, complex organization, this program humanizes the workplace and creates lasting relationships. Next spring when we open up the program to our customers, this benefit will extend to them as well and further enhance the value it brings.

Understanding

Not only are participants learning about the industry, they are learning about how our organization works and they are able to apply what they learn directly to their work situations. This more holistic approach countersinks their learning and grounds it in the reality of our real world workplace to create a broader understanding of the concepts in the Body of Knowledge. It also creates a better understanding of how our dynamic organization works. Providing this context is unique to our program and is proving to be maybe the most valuable aspect overall. This program transforms obtaining a credential from a professional development endeavor to an organizational development tool.

2017 Effective & Innovative Practices Award Application ***Portability and Sustainability***

With commitment from senior leadership and dedication from employees, the **Penn State APPA Credentialing Cohort Program** can be applied at any institution looking to not only educate and credential employees but also foster a sense of camaraderie and shared experiences among the staff.

The financial investment required of an institution will depend on the location of the institution and the sponsorship or support available from the region. (At the present time, some APPA regions fully sponsor credentialing while others offer reduced rates.) For Penn State – a member of the Eastern Region of APPA, which currently fully supports credentialing – the financial investment is limited to the lunches provided and a few administrative costs for hosting an in-person one-day prep course ahead of the proctored examinations held on campus.

The lunch-and-learn aspect of the program limits an employee's time away from his/her regular duties. While certainly not necessary to the successful education and credentialing of employees, the fact that lunch is provided by the institution is a nice gesture and represents a low-cost opportunity to build morale and encourage participation during an employee's normal lunch break.

The time commitment required of the institution and its employees is more substantial, but wholly worthwhile. Credentialed staff from each of the four core areas of the Body of Knowledge need to be identified and prepare for discussions that cover both institutional as well as APPA policies, procedures, and best practices. Additional staff support may be required to coordinate meeting and testing space, monitor online forums and quiz completion, assist employees with initial registration challenges, and order food and beverages. In addition to the weekly organized sessions, participants commit time outside of the program to reading and exam preparation.

Not only is the **Penn State APPA Credentialing Program** *applicable* at other institutions, it *can be* beneficial, and it *should be* desirable.

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Management Commitment and Employee Involvement

Penn State's demonstrated management commitment and employee involvement has grown as the program has matured and developed. Involvement begins with the Assistant Vice President, Steve Maruszewski, who has been actively engaged in developing and promoting the program. There is a group of seven staff members who have developed content or assist with the administration of the program. Leadership throughout the organization is very supportive as evidenced by the number of candidates who have been given the time to participate in the program.

The group of seven employees who administer the program not only work on the planning and logistics of moving each cohort through the process, they also develop content and provide assistance for the program. Based on their experience of completing the credentialing program themselves, this group offers assistance and advice that augments what APPA provides as part of the CIL platform. For the part of the program that focuses on how Penn State operates, customized content has been developed for each of the four learning modules that provides explanations and insights into how Penn State puts Body of Knowledge concepts into operation.

Our organizational commitment is clearly demonstrated by the fact that the organization paid for the first three cohorts to participate in the credentialing program prior to financial support from our region being made available. Also, the number of participants who have successfully completed the credentialing program is another demonstration of our commitment. To date, we have had 103 participants test in the four cohorts we have sponsored. In fall 2016, we expanded the program to include technical service employees and had four participate in the program. In the spring 2017 cohort, we will be expanding our commitment by offering this opportunity to some of our customers. Three facility coordinator customers have already expressed interest in participating.

The organization has devoted thousands of hours of time and significant financial resources to offer this exciting opportunity to our employees and they have accepted the challenge eagerly and participated enthusiastically.

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Documentation, Analysis, Customer Input, and Benchmarking

During the first iteration of the **Penn State APPA Credentialing Cohort Program** (2014), 80 employees participated and 78 of those employees were successfully credentialed as a result (33 CEFPs and 45 EFP). Penn State was recognized by APPA in 2014 and 2015 with the Institutional Credentialing Award accordingly.

During this most recent and revised iteration of the program, which incorporated the CIL and expanded discussion of both OPP and APPA policies, procedures, and best practices, the success rate did decline (23 tested, 13 were successful). This was the first time participants tested using “the new exams” which anecdotally have had lower success rates overall. Debriefing is underway with recent participants to determine what may have contributed to this decline. This feedback will be utilized to revise and enhance future offerings to facilitate participant success.

Overall satisfaction with both iterations of the program has been high among participants. The success of and satisfaction with the first iteration of the program is well-documented in Steve Maruszewski’s article in the January/February 2015 issue of *Facilities Manager*.

When asked to comment on the **APPA Credentialing Cohort Program**, Penn State’s Senior Vice President for Finance & Business David Gray said, “I have been so pleased to hear of the success of the Office of Physical Plant’s cohort approach to professional development with the APPA credentialing program. As I have said in the Finance and Business unit strategic plan, each Finance and Business employee helps to make F&B stronger, and a stronger F&B builds a better foundation for Penn State’s education, research, and service missions and for advancing the institution as a student-centered University. The program builds upon this philosophy by developing individual employees and the Physical Plant organization. As such, it is consistent with our strategic plan focus which includes revitalizing our workforce in new and meaningful ways. The APPA credential validates our employees’ knowledge, skills, and abilities and elevates the facilities management profession as a whole to better serve our customers.”

At this time, no known institutional counterparts employ a similar professional development against which the Penn State program could be benchmarked.