

PENNSYLVANIA FACILITIES MANAGERS ASSOCIATION



LONG-TERM EDUCATION PLAN
June 1, 2009

Long-Term Education Plan

Prepared for

The Pennsylvania Facilities Managers Association

Prepared by

**The Pennsylvania Facilities Managers Association
Long-Term Education Planning Committee**

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EXECUTIVE SUMMARY

Long-Term Education Plan Mission — In support of the Pennsylvania Facilities Managers Association Mission, *we will make affordable educational opportunities available to each PFMA member and their facility to enhance job knowledge, performance, and professional growth.*

Education and training are vital to the PFMA (Pennsylvania Facilities Managers Association) mission and critical to the effective management of facilities throughout the Commonwealth of Pennsylvania. Education-based planning and programs will ensure that facilities management personnel and staff have current information on the practices and strategies of project management, construction, and the operation and maintenance of physical property and equipment at Commonwealth facilities.

The PFMA Long-Term Education Plan supports the Association's focus on providing quality, affordable educational opportunities to member agencies and facilities.

The plan incorporates the following five goals:

- Goal I. Provide Professional Development Through Continued Education and Training**
- Goal II. Provide On-site Educational Opportunities**
- Goal III. Promote Knowledge Sharing and Educational Opportunities**
- Goal IV. Establish the PFMA Website as an Information and Training Portal**
- Goal V. Update PFMA Long-Term Education Plan Biennially**

Detailed information regarding these goals and methods of achievement is provided in the following documentation.

GOAL I
PROVIDE PROFESSIONAL DEVELOPMENT THROUGH
CONTINUING EDUCATION AND TRAINING

Professional development of facility managers and staff is essential to ensure the up-to-date knowledge necessary to effectively manage and maintain their facilities. It is also vital to guarantee the succession of qualified, knowledgeable facility managers for the future.

OBJECTIVE 1. DEVELOP TIMELY EDUCATIONAL AND TRAINING OPPORTUNITIES

PFMA must provide and promote education and training opportunities to continue to progress as an organization recognized by facility management personnel throughout the Commonwealth. The PFMA Board of Directors and Education Committee Chairman shall be responsible for identification and development of programs that meet the educational needs of the general membership.

Strategy 1. Establish Annual Education Budget

The PFMA Board of Directors, at the request of the President and the Education Committee Chairman, shall allocate funds for annual training and educational endeavors.

Strategy 2. Identify Continuing Education Opportunities

Continuing educational opportunities, both internal and external, will be identified on the PFMA website. These opportunities will include, but not be limited to, specific PFMA training events, facility manager training programs such as those offered by the International Facility Management Association, and programs offered by higher educational institutions.

Strategy 3. Identify Supplementary Educational Funding Availability

Educational funding opportunities, specifically for external educational sources, will be identified on the PFMA website

OBJECTIVE 2. ESTABLISH PFMA TRAINING REQUIREMENTS

All training and educational endeavors undertaken directly or promoted by PFMA must meet the mission, goals, and objectives of the Association and the Long-Term Education Plan.

Strategy 1. *Develop Training Objectives and Requirements to Ensure Continuity in Mission and Purpose*

The PFMA training requirements shall include the following:

- a. Training events shall be facility related.
- b. The training must benefit the membership by enhancement of job knowledge, performance, and/or professional growth.
- c. The training opportunity must be cost effective as deemed by the PFMA Board of Directors.

OBJECTIVE 3. **PUBLIC AND PRIVATE SECTOR COMMUNICATION**

Communication between public and private sectors is an important component of the educational plan. PFMA growth and educational opportunities beyond Commonwealth executive agencies have been identified and will be recognized for the value they offer.

Strategy 1. *Utilize PFMA Website for Coordination*

The PFMA website is an ideal venue for the dissemination of information beneficial to the membership. It will provide the opportunity for all members, public or private, to submit information for the enrichment of all members.

GOAL II

PROVIDE ON-SITE EDUCATIONAL OPPORTUNITIES

Due to ever-tightening travel budgets, PFMA has recognized the need and importance of on-site training for its membership. Although this opportunity initially focuses on state vendor-training programs, public-sector members will be able to utilize the same vendors and have access to the training benefits.

OBJECTIVE 1. UTILIZE STATE VENDOR TRAINING PROGRAMS

The Pennsylvania Department of General Services (DGS) has procured “one-source” opportunities for the executive agencies. Many of these vendors offer valuable on-site training programs.

Strategy 1. Identify Existing State Vendor Offerings

Currently, the number of state vendors offering on-site training opportunities is limited; however, the number and content of the available training courses are excellent. The educational component of the PFMA website will contain a State Vendor Offerings section that will identify links and contact information for participating state vendor programs.

Strategy 2. Promote Training as a Component of State Service Contracts

The PFMA Board of Directors and the Education Committee Chairman will contact the Director of Procurement for DGS Bureau of Procurement (Materials) to discuss training as a component for the larger state vendor contracts.

OBJECTIVE 2. UTILIZE PRIVATE-SECTOR TRAINING OPPORTUNITIES

Private-sector training opportunities will be identified on the PFMA website as links on the education page of the website.

Strategy 1. Identify Non-Profit Organizations

Non-profit organizations such as the International Facility Management Association, the Pennsylvania Rural Water Association, and the Association of Energy Engineers offer facility and energy-related courses and certifications. These organizations will be identified on the education page of the PFMA website.

GOAL III

PROMOTE KNOWLEDGE SHARING AND EDUCATIONAL OPPORTUNITIES

The facilities managers and staff throughout the Commonwealth possess a wealth of knowledge. The sharing of that knowledge is crucial to existing and future facility managers. In addition, educational opportunities at the local and regional levels are a powerful tool for development of the trades and facility staff.

OBJECTIVE 1. DEVELOP ANNUAL SUPERVISORS MEETINGS

The PFMA Education Committee Chairman shall be responsible for organizing two meetings each calendar year, one for Mechanical, Utility Plant, and HVAC Supervisors and one for Electrical Supervisors. These annual meetings for the trades supervisory staff will enhance the knowledge of first-line supervisors by providing timely educational presentations and an opportunity to share problems and their subsequent resolutions.

Strategy 1. Provide Annual Budget Allowance

Upon recommendation from the Education Committee Chairman and the President, the PFMA Board of Directors shall consider an annual budget allocation to achieve this strategic objective.

OBJECTIVE 2. DEVELOP ANNUAL MANAGER MEETINGS

The PFMA Education Committee Chairman shall be responsible for organizing one manager meeting each calendar year. An annual meeting for Facility Maintenance Managers and Facility Managers from public and private entities will provide an opportunity for training, presentation of timely topics regarding equipment, update of facility management trends, and knowledge sharing.

Strategy 1. Provide Annual Budget Allowance

Upon recommendation from the Education Committee Chairman and the President, the PFMA Board of Directors shall consider an annual budget allocation to achieve this strategic objective.

OBJECTIVE 3. UTILIZE THE PFMA WEBSITE

An enhanced PFMA website will provide opportunities for knowledge sharing and identification of available educational opportunities. The PFMA President shall appoint a Website Administrator from the membership. All requests for

postings, notifications of broken links or issues, and recommendations for improvements shall be forwarded and acted upon as deemed necessary by the Website Administrator. The website host, currently Penn State Facilities Engineering Institute (PSFEI), shall assign a Webmaster to effect website changes presented by the Website Administrator.

Strategy 1. *Post Facility Success Stories on Website*

The website presents a unique opportunity for the sharing of success stories and information.

Strategy 2. *Provide a Forum Via a Web Message Board*

The website shall be designed to include a forum where members will be able to log in and provide or seek general information, advice, etc. This work will be completed and monitored by the Website Administrator and Webmaster.

OBJECTIVE 4. PROMOTE REGIONAL MEETINGS/NETWORKING OPPORTUNITIES

Regional meetings and training opportunities present one-day events that minimize facility costs. These regional events shall be organized and administered by the Regional Training Chairman appointed by the Education Committee Chairman and President. The regional training events shall be organized specifically for the training of trades staff.

Strategy 1. *Reorganize the Regional Training Committee*

The Regional Training Committees shall consist of a Chairman and two committee members appointed by the Regional Chairman from each training region. The training regions shall be Central, Southwest, Northwest, Northeast, and Southeast.

Strategy 2. *Provide Annual Budget Allowance for Regional Training Committees*

Upon recommendation from the Education Committee Chairman and the President, the PFMA Board of Directors shall consider an annual budget allocation to achieve this strategic objective.

Strategy 3. *Develop Training Opportunities for the Trades Staff*

In addition to regional training opportunities, PFMA shall promote training opportunities for the trades staff by posting regional and statewide on-site training opportunities on the PFMA website. Additionally, PFMA shall include a Trades Day Training Program for the Annual Training Seminar.

GOAL IV
**ESTABLISH THE PFMA WEBSITE AS AN INFORMATION
AND TRAINING PORTAL**

The PFMA website will be redesigned and used as a portal for training and educational opportunities for all employees at the state, regional, and local levels.

OBJECTIVE 1. MOVE WEBSITE TO HOST SERVER AT PSFEI

PSFEI has agreed to host the PFMA website on a server in State College, PA. The PFMA Web Administrator, the PSFEI Information Systems Coordinator, and the Penn State College of Engineering shall be responsible for relocating the website.

Strategy 1. *Purchase New PFMA Domain*

PFMA must purchase a new Domain to host the Association's website.

OBJECTIVE 2. MAKE WEBSITE IMPROVEMENTS

In order for the website to be used as a valuable training and educational tool, improvements will be required.

Strategy 1. *Improve Content of Website*

Numerous improvements are planned for the website, which include educational announcements; news and success stories; state vendor training opportunities; local, regional, and statewide educational opportunities; and a forum for posting new experiences and requests for information.

OBJECTIVE 3. DEVELOP AN EDUCATIONAL DIRECTORY

A directory will be developed that will enable the user to view and visit links for training and educational opportunities.

Strategy 1. *Provide Links to Facility Management Organizations and Associations*

Links to facility management organizations and associations, such as the International Facility Management Association, will be provided.

Strategy 2. *Provide Links to Available Private Sector e-Training*

Links to e-Training opportunities will be provided on the website.

OBJECTIVE 4. ENSURE WEB LINKS ARE CURRENT AND ACCURATE

Accurate web links are an important aspect of a successful website. Thorough review of all content and response to membership notification of broken links will help ensure that content is current and links are active.

Strategy 1. *Education Chairman and Web Administrator Will Review Website Links on a Semi-Annual Basis*

Reviews for specific content and link functionality shall be conducted in January and June of each calendar year.

Strategy 2. *Respond to Membership Feedback (Member Notification of Error with Link)*

If a broken link is encountered, the member will be able to report the error by activating the Report Broken Link button on the website home page. The broken link report will be directed to the Website Administrator.

OBJECTIVE 5. DEVELOP WEBSITE POSTING PROCEDURES

All website postings, inquiries, broken-link reports, suggestions, etc. shall be directed to the Website Administrator. The Website Administrator shall then review and consider all requests prior to forwarding to the Webmaster for website modification.

Strategy 1. *President Appoints Website Administrator (for Approvals and General Website Administration)*

PSFEI, as the website host, will appoint a Webmaster who will make website changes as deemed necessary by the Website Administrator.

Strategy 2. *Provide a Description on Posting Procedures to all PFMA Members*

Website posting procedures shall be as follows:

- a. All posting requests including training notifications, general input, success stories, and error reporting shall be forwarded ONLY to the Website Administrator.
- b. The membership will be able to contact the Website Administrator by using the Contact Website Administrator button that appears at the bottom of each website page. The information will automatically be directed to the Website Administrator.

OBJECTIVE 6. DEVELOP A CALENDAR OF EVENTS FOR WEBSITE USERS

The Education Committee Chairman shall work with the Website Administrator to develop an Annual Calendar of Events for the membership.

Strategy 1. Develop an Event Schedule for Posting

Development of the Annual Calendar of Events shall be as noted above. Actual website posting shall be coordinated by the Website Administrator and Webmaster.

GOAL V

UPDATE PFMA LONG-TERM EDUCATION PLAN BIENNIALLY

The PFMA Long-Term Education Plan is a dynamic document that will require continued refinement and modification to benefit the membership. The Plan Committee has determined that a biennial review and update is appropriate.

OBJECTIVE 1. PRESIDENT APPOINTS EDUCATION PLAN COMMITTEE BY PFMA BOARD POSITION

The Long-Term Education Plan Committee shall consist of the President, Vice-President, 2nd Vice-President, Education Committee Chairman, Website Administrator, and an Ad-Hoc member (if desired).

Strategy 1. *The Education Committee Chairman Will Coordinate and Lead Plan Update Efforts*

OBJECTIVE 2. REQUIRE UPDATE PRESENTATION AT ANNUAL TRAINING SEMINAR IN CALENDAR YEARS 2011, 2013, 2015, ETC.

Each updated plan shall be completed by July 1 of the review year. This schedule will provide ample time for distribution and review by the membership prior to the formal plan presentation at the annual training seminar.

OBJECTIVE 3. ASSESS FUTURE EDUCATIONAL NEEDS

As the educational needs of the membership change, so must the PFMA Long-Term Education Plan. The Long-Term Education Plan Committee shall assess current and future member educational needs. This information shall be incorporated into the biennial plan updates.

Strategy 1. *Distribute Educational-Needs Questionnaires to Members and Facility Executive Staff*

As a component of the biennial plan update, an educational-needs questionnaire shall be made available on the PFMA website for member input and recommendations.

OBJECTIVE 4. IDENTIFY CURRENT FACILITY MANAGEMENT TRENDS

To maintain information on current facility management practices and trends, PFMA must interact with other facility management associations and organizations.

Strategy 1. *Interaction with Facility Trades Associations and Organizations*

The PFMA Board of Directors is encouraged to attend facility trades association and organization events. The Board of Directors must approve any expenses for attendance in advance of the event.

Strategy 2. *Support for Representatives to Actively Gather Information by Attending Facility-Related Functions and Conferences*

Members of the PFMA Board of Directors are encouraged to interact with management personnel while attending facility related functions and conferences. The Board of Directors must approve any expenses for attendance in advance of the event.

**Pennsylvania Facilities Managers Association
Long-Term Education Plan Committee Members**

Robert M. Bruce, Chairman

Jan Blosser, PFMA President

Robert Kleimenhagen, PFMA 1st Vice President

Ty Wagner, PFMA 2nd Vice President

Jack Christensen, Website Administrator

Larry Buchanan, Ad Hoc Member