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Highlighting APPA's
Newest Meritorious Service
and APPA Fellow Recipients

3 Schools Win 2016
Award for Excellence

Nashville Conference
Highlights

2016 Thought Leaders
Report, Part 1

Creating a New Normal

A Profile of President Chuck Scott

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CREATING APPA'S NEW NORMAL

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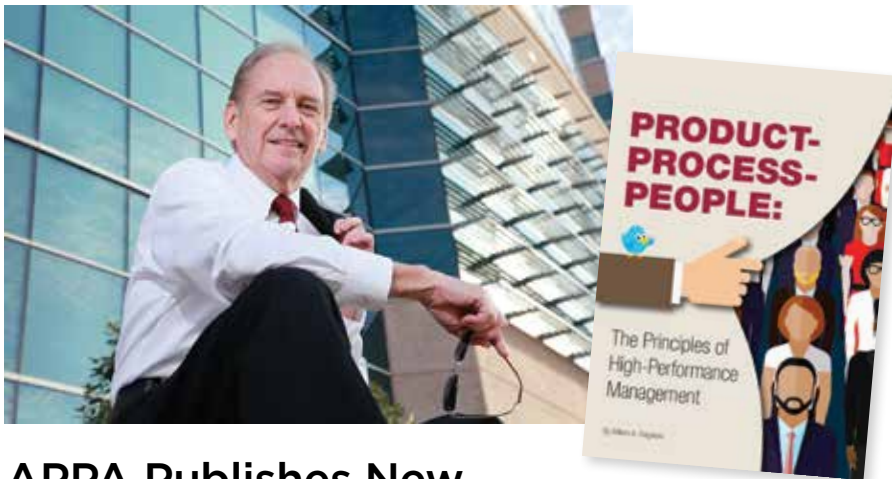


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APPA Publishes New Leadership and Management Book

We are pleased to announce the publication of a new book by long-time APPA member Bill Daigneau, shown above. *Product-Process-People: The Principles of High-Performance Management* takes an in-depth dive into those three key ingredients that comprise any organization, particularly the enterprise of educational facilities.

According to Bill's introduction:

Products are the fundamental purpose of any group of people organized to produce and deliver them. Then there are processes, the means by which those people actually produce that product. And finally there are the people themselves, each willing to devote their time and energy in the completion of the necessary processes to produce the product.

He proceeds to lay out the foundation for all three legs of the management stool, and builds your understanding through personal examples, industry anecdotes, and a solid literature review. As APPA Past President Jack Hug wrote about the book, "When you put down this book, you will be more confident as a manager and know more about your organization: what is most important, why things happen, why things don't happen, and what forces are at play."

Bill Daigneau earned an engineering degree from Case Western Reserve University and an MBA from Bradley University.

He worked in educational facilities at the University of Wisconsin Stout, University of Northern Colorado, University of Rochester, and the University of Texas MD Anderson Cancer Center, where he retired in 2012 after 18 years of service.

For APPA, Bill served as Vice President for Educational Programs, was an inaugural APPA Fellow in 2004, received APPA's Meritorious Service Award and a record four Rex Dillow Awards for Outstanding Article in *Facilities Manager*, was editor for the APPA/NACUBO publication *Planning and Managing the Campus Facilities Portfolio*, and was an author and Planning, Design & Construction content coordinator for the Body of Knowledge (BOK).

Product-Process-People is available from the APPA Bookstore for \$32 for APPA members, \$45 for nonmembers. You can also purchase the 163-page book at a quantity discount when ordering 10 or more copies. It's an excellent book that we know you'll enjoy reading and sharing with your staff. ☺

COMING IN NOV/DEC 2016

- Designing a Resilient Campus
- Optimizing Building Environments with BEMS
- Home and Campus Care
- 2016 Thought Leaders Report, Part 2

FACILITIES manager

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Design & Production

www.touch3.com

Printing

Corporate Press, Inc.

Editorial Office

703-542-3837

Fax: 703-542-3782

Advertising and New Products

Gerry Van Treeck, 847-347-7851

gvtgvt@earthlink.net

www.appa.org/facilitiesmanager

Facilities Manager (ISSN 0882-7249) is published six times a year (January, March, May, July, September, and November). Send editorial submissions to steve@appa.org. A portion of APPA's annual membership dues (\$53) pays for the subscription to *Facilities Manager*. Additional annual subscriptions cost \$66 for APPA members, \$120 for nonmembers. Contact the editorial office for article reprints.

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POSTMASTER: Send address changes to *Facilities Manager*, 1643 Prince Street, Alexandria, VA 22314-2818.

About APPA

APPA promotes leadership in educational facilities for professionals seeking to build their careers, transform their institutions, and elevate the value and recognition of facilities in education. Founded in 1914, APPA provides members the opportunity to explore trends, issues, and best practices in educational facilities through research, publications, professional development, and credentialing. Formerly the Association of Physical Plant Administrators, APPA is the association of choice for more than 13,000 educational facilities professionals at more than 1,500 learning institutions throughout the United States, Canada, and abroad. For more information, visit us at www.appa.org.

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FPI Survey Now Open for 2015-16 Data Input

The 2015-16 cycle of APPA's Facilities Performance Indicators (FPI) survey is underway! Participating in the survey yields potent peer comparison key performance indicators, making the FPI a flexible, sophisticated, and powerful tool for analyzing, planning, reporting, and managing your facilities operation. APPA is the only higher education professional organization that provides such a powerful tool to its members.

Although the deadline isn't until **December 15**, the earlier you start, the more time you'll have to give your operations the critical analysis that the FPI fosters, and realize the benefits of the results it generates. Visit www.appa.org/research/fpi for more information and to register to complete the survey.



APPA/SRAPPA/TNAPPA 2016 Conference Photos Available on Shutterfly

You can access and download electronic images of the annual conference from our Shutterfly photo album at <https://appanashville2016.shutterfly.com/41>. You can also purchase prints and have them shipped to you.



Save the Date

APPA 2017 ANNUAL MEETING & EXPOSITION

APPA/PCAPPA

2017 Annual Meeting and
Exposition

Hilton San Francisco

July 21-23, 2017

Mark your calendar to attend next year's meeting and exposition. You won't want to miss this exciting gathering of fellow facilities professionals and exceptional speakers!



Become an APPA Officer: Nominations for 2017 are NOW OPEN

APPA's strong and steady volunteer leadership is one of the core forces making us the association of choice for educational facilities professionals. Consider becoming a candidate for an elected APPA officer.

Elected officers gain valuable leadership skills and a chance to develop professionally in many meaningful ways, because being an officer provides a major opportunity to give back to the entire profession. Being an APPA elected official does require a personal commitment of time and energy. However, past elected officers will tell you that the personal rewards and professional benefits outweigh the costs of engagement and time commitments. There are five elected officer leadership positions, three of which will be on the 2017 ballot:

- President-Elect
- Secretary-Treasurer
- Vice President for Professional Affairs

Consider nominating yourself—or others—for the position that best matches your passion and areas of expertise. Learn more at www.appa.org/board/cfm. All applications and nominations for APPA office are due no later than **December 9, 2016**.



2017 Award Nominations Applications Due November 30, 2016

Nominations and applications are now being taken for APPA's 2016 institutional and individual awards:

- Award for Excellence in Facilities Management
- Sustainability Award
- Effective and Innovative Practices Award
- APPA Fellow
- Meritorious Service Award
- Pacesetter Award

Awards nominations submitted after November 30, 2016 will be held and considered in the 2018 award cycle. To find out details about each award, visit <http://www.appa.org/membershipawards/index.cfm> or contact Christina Hills at christina@appa.org.

APPA Events

Oct 19, 2016

Drive-In Workshop, Michigan State University (sponsored by Tandus-Centiva), East Lansing, MI

Oct 24-27, 2016

ACUHO-I/APPA Housing Facilities Conference, Scottsdale, AZ

Dec 6-9, 2016

Woman's Leadership Institute, Dana Point, CA

Regional Events

Sep 18-20, 2016

PCAPPA 2016 Conference, Pasadena, CA

Sep 25-28, 2016

RMA 2016 Conference, Flagstaff, AZ

Sep 26-30, 2016

Supervisor's Toolkit, University of North Carolina, Chapel Hill, NC

Oct 1-5, 2016

MAPPA 2016 Conference, Des Moines, IA

Oct 8-12, 2016

CAPPA 2016 Conference, Little Rock, AR

Oct 10-13, 2016

Supervisor's Toolkit, University of New Mexico, Albuquerque, NM

Oct 10-14, 2016

Supervisor's Toolkit, University of Kentucky, Lexington, KY

Oct 16-19 2016

ERAPPA 2016 Conference, Niagara Falls, Ontario, Canada

For more information or to submit your organization's event, visit www.appa.org/calendar.



APPA/PCAPPA/BayAPPA 2017 Call for Papers: *Submission Deadline, November 4, 2016*

APPA/PCAPPA/BayAPPA invite you to submit a program presenting solutions for improvement and sharing of best practices or innovative approaches relevant to facilities professionals throughout the educational community—colleges, universities, community colleges, and K-12. The APPA/PCAPPA/BayAPPA 2017 annual conference offers an opportunity for you to be part of APPA's outstanding professional development program, to participate in discussions, and share effective strategies addressing the many challenges facing facilities professionals today.

The selected proposals will provide a program that offers innovative, comprehensive, and diverse treatment and solutions to challenges facing facilities professionals. Topical areas to be addressed are:

Remaking the Facilities Organization

- Organizational Culture & Leadership—What Are Your Priorities?
- Employee Empowerment & Commitment
- Securing Our Seat at the Table

Future of the Built Environment

- Dealing with the Rising Costs of Higher Education
- Sustainability of the Physical Aspect
- Staying Ahead of the Curve—What's Next in Regulatory Codes?

Preventive Maintenance for People

- Round Peg, Square Hole—Matching the Right People for the Right Job
- What Are You Worth?—Recognizing Your Value
- Invest Now—Or Pay Later Professional Development is Your Best Investment

Space: The Ever Changing Frontier

- Your Space, My Space, Our Space—Partnering With Academic Colleagues
- It's All One Big Sandbox—Best Practice In Flexible Space Usage
- Classes Will Commence On the Quad—Flipping the Classroom

Innovations & Technology

- Impact of Facilities and the Student Experience
- Click Here—Technology: What's Next & Are You Ready?
- Be Safe—Security for the Whole Campus Community

The slate descriptions above are provided as a guideline to those wishing to submit. APPA's goal each year is to provide topical material that is cutting edge and key to the success of all facilities professionals. If you have a topic that you feel is key

for consideration, but may not align exactly with the proposed guidelines for this year's conference, we encourage you to submit for review.

Proposals are being accepted for 60-minute concurrent sessions. Programming will occur **July 21-23, 2017 in San Francisco, California**. Eight to ten educational sessions will run concurrently in two to three time slots per day.

Here are the requirements for your submission as you prepare your proposal:

- Submission of program title that is 3-5 words in length, along with your abstract that is in a format of a 5-7 sentence description;
- Submission of 4 learning outcomes;
- Submission of complete contact information for each potential presenter to include full name, title, institution or company, phone and e-mail address;
- Submissions from business partners must include a partnering with an educational entity.
- Submissions can be made by e-mail to ***callforprograms@appa.org***.
- Submissions will be automatically rejected if the above items are not included.

For the latest on APPA/PCAPPA/BayAPPA 2017 Call for Programs and other programming submission offerings visit us at <http://www.appa.org/training/APPA2017/index.cfm> and click on Conference Sessions.

If you have questions, contact Suzanne Healy, director of professional development, at suzanne@appa.org or 703-542-3833.



APPA Mentoring Program

Mentoring is an essential leadership skill. In addition to managing and motivating people, it's also important that you can help others learn, grow and become more effective in their jobs. Do you want to move your career forward? Would you like to develop your leadership skills as well as help others learn, grow, and improve their skills? Or would you like to find someone who can help you do these things? APPA has good news—you can do so through a mentoring partnership. Visit us at <http://www.appa.org/committees/mentoring.cfm> to review how APPA's initiative is well underway, and how to contact your region or regional representative for more information on applying for this great opportunity!



APPA's 2016 Regional Meetings

Mark your calendar for a regional meeting this fall!

Regional conferences are a great way to meet other facilities professionals and learn new tips and ideas to bring back to your institution! Meet vendors, attend sessions, and enjoy the company of like-minded professionals wishing to improve their skills, and move their careers forward!

PCAPPA Regional Meeting

PCAPPA 2016
September 18-20, 2016
Pasadena, California

RMA Regional Meeting

RMA 2016
September 25-28, 2016
Flagstaff, Arizona

MAPPA Regional Meeting

MAPPA 2016
October 1-5, 2016
Iowa State University
Ames/Des Moines, Iowa



CAPPA Regional Meeting

CAPPA 2016: Energizing Your
People and Utility Plants
October 8-12, 2016
Little Rock, Arkansas

ERAPPA Regional Meeting

ERAPPA 2016 Regional
Conference
October 16-18, 2016
Niagara Falls, Ontario Canada

SRAPPA Regional Meeting

APPA/SRAPPA/TNAPPA
Held July 2016
Nashville, Tennessee



Doug Christensen—A Man of Many Firsts

1947-2016

By E. Lander Medlin

Doug Christensen—just the name evokes powerful memories in all who knew him. As a matter of fact, his memory is one we all wish to give tribute to, to formally recognize, to truly memorialize. As such, these are mine.



Photo by Anita Dosik

A TRUE SERVANT LEADER

I studied under and was mentored by Doug Christensen, as many of you were as well. That journey started in 1987...yes, almost 30 years ago. He was already on his way to becoming a legend, yet, naively, I did not know it. Mainly because he was so humble, so warm and welcoming, so ready to help anyone willing to open their hearts and their minds to a creative visionary's ideas, philosophies, and principles. And so he was, the consummate "servant leader" with the emphasis on both words. A servant to everyone, a leader above all. In fact, he was the first of many firsts in terms of awards, achievements, and acclaim. To give structure to his legacy, I am reminded of one of my articles entitled "Leadership – The Head, The Hand, and The Heart." Of course I sought Doug's advice and wisdom in its development, so it has special meaning and relevance.

"Leadership is not about your position and vested authority. Leadership is about the influence and personal power you build over time with those whom you work or come into contact." Therefore, leadership requires a principled center, an openness to learning and new ideas, a passion for performance—real results, and an enduring, unshakable belief in people. All done with compassion and always in service to others. So it was with Doug. A "mountain of a man" who was able to move mountains (in this case, an entire profession) because he didn't care who got the credit.

THE HEAD

Doug was a mental giant. So much so that many of us were continually amazed by how he could not only create a vision for the future, but strategically formulate the detailed data and information to rein-

vent it, to transform our industry, and, thereby change its culture.

For example, his ability to demonstrate “need” (not the dollars) as the basis for Brigham Young University’s institutional resource allocations was and still is genius. He aptly stated, *“Focusing on what the needs are is a much different process than trying to start at how many dollars you have and trying to maximize them.”* His ability to think effectiveness over efficiency was and is transformational genius. His ability to build a framework for asset management integrated decision making, which he began studying in the 1980s, was and is creative genius. All as the precursor to drive the Total Cost of Ownership model/principle for total asset management (not facilities management—it’s a much bigger, overall vision).

And, that’s just the tip of the iceberg concerning his impact on the facilities management profession. In his spare time, he launched APPA’s Professional Leadership Center so that we could further develop leadership skills (the Leadership Academy), further knowledge through research (the Center for Facilities Research—CFaR), and finally establish a mechanism for appropriate recognition (the Fellow designation). What a slacker!

THE HAND

Whether you view “the Hand” as a “helping hand” or a “pen in hand,” Doug accomplished both in spades. With “pen in hand” he authored or co-authored over 20 articles and several ground-breaking books that are still considered seminal pieces to this day. One in particular was his 1987 article entitled “Integrating Capital Studies within Physical Plant Organizations” which received the first Rex Dillow Award for Outstanding Article in APPA’s *Facilities Manager* magazine. To date, his focus on asset management has culminated in APPA’s Standards and Codes Council’s (ASCC) development of an ANSI standard that supports the application of TCO principles and practices within the facilities sector, entitled *APPA 1000 TCO for Facilities Asset Management*. This first standard will be dedicated to Doug’s memory.

No matter the moment, Doug was always willing to extend a helping hand. He was ready to listen

And so he was, the consummate “servant leader” with the emphasis on both words.



and give of his sage advice, and share his wisdom, and guidance. He could always be depended upon to support, encourage, and guide his colleagues and his family. He was indeed the guiding force behind so many others’ professional growth and development.

Taken directly from one of Doug’s *Facilities Manager* magazine articles (“Standing on Shoulders,” November/December 2009) he said,

In every case, when you mention the profession, the association, or their contribution to the big picture, they have a story to tell. The stories always include a special moment, a caring person, or an event that allowed them to stand on the shoulders of those who offered helping hands, so that they could someday be in the position to return the favor. If you take time to look back at your journey, no matter how long or short it has been, you will see the helping hands or the encouraging lift from someone who helped with a difficult problem or taught you something that saves time and effort. I would like to say thanks to the many people who have helped me in all that I have attempted to do. The shoulders have been very broad and very strong.

All of his accomplishments took incredible intellect and skill, it also took unbelievable heart.

THE HEART

Looking back, it makes sense to me that Doug wrote that article (Standing on Shoulders), since that is quintessential Doug. The humble, unassuming gentleman who, to his death, gave praise to all those before him, and thanks for the opportunity to sit at the feet of remarkable leaders. Indeed, the shoulders—His SHOULDERS—have been very broad and very strong. And, as a result, we all stand a little higher, become a little smarter, and our day-to-day decision making a little better.

But frankly, Doug's drive for vision, and quest for data and information, all paled to his love for, value of, and belief in PEOPLE. In fact, he concluded his article in 1987 by saying, *"The computer is a tool and enables us to organize the information, but it's the people who make the capital needs program work at BYU."* That's one of the many statements throughout his entire career that captures his passion for people! His presidential theme in 1995-96 was *"Vision, People, and Process"* where he said, *"... more teamwork, energy, synergy...you're trying to*

be there for the good of all...we're in this together and can't reach our common goals unless we do it together."

It may sound a bit cliché, but it was the essence of everything he stood for over time. He said, *"The success of APPA is in the hearts and minds of those who belong...what a great opportunity it is to be part of APPA and to share with all the people who really make our profession what it is."* Doug won many awards, but his greater gift was how he treated people as he went about winning those awards.

The BYU Facilities Management department motto is *"What-e'er thou art, act well thy part"*. And so he did. Let's recount...

The number of "FIRST's"—every professional category of education, research, and recognition are astounding. And, as you can surmise, Doug has had an enormous impact and incredible influence, positively touching the lives of thousands of people worldwide.

As a facilities professional, Doug was the personification of leadership—a visionary, scholar and educator, trusted colleague and mentor.

As a family man, Doug was the quintessential sage—a brilliant advisor, a shining example...where work was central.

As a friend, Doug epitomized friendship—unassuming, unconditional, and selfless.

In the BYU Visitors Center is a placard that says, *"Let your light so shine."* Indeed, the world is better place because of Doug; the association is a better place because of Doug; and I (and so many others) am a better person because of Doug.

His legacy will stand the test of time. ☺

Lander Medlin is APPA's executive vice president and can be reached at lander@appa.org. Doug Christensen, APPA Fellow and Past APPA President, died on August 20, 2016.

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Membership Means Networking

By Raymond Mirizzi

With the ever-growing pains of providing facilities services with continually reduced financial resources, one could easily ask, “Why get involved with membership in an association, when that only requires more time and resources?” To understand the need for this valuable tool, you must first realize that it is the people who make a business successful. Integrity, knowledge, professionalism, and networking are some basic ingredients for successful employees—and involvement with a professional membership association can be key to their success.

I GET IT

I get it. I have been in facilities-related work for over 40 years. During my short tenure of just over four years at my current position, resources have been reduced twice, to a total of nearly \$1 million in operating cost reductions. Yes, those kinds of cuts make for difficult decisions and challenging choices—which is the very reason you should be active in an association directly related to facilities services.

In today’s economy you must have a well-trained team who can deliver the very best while operating as effectively and efficiently as possible under extremely lean budgets. APPA provides a place for crucial networking and learning experiences that will help you meet that need.

When I first began my career in facilities services, the stigma of facilities-related jobs was difficult to overcome. The work was necessary, but not looked upon with high regard. The current view that facilities are a critical part of the whole campus operation was not widely held. Energy management was

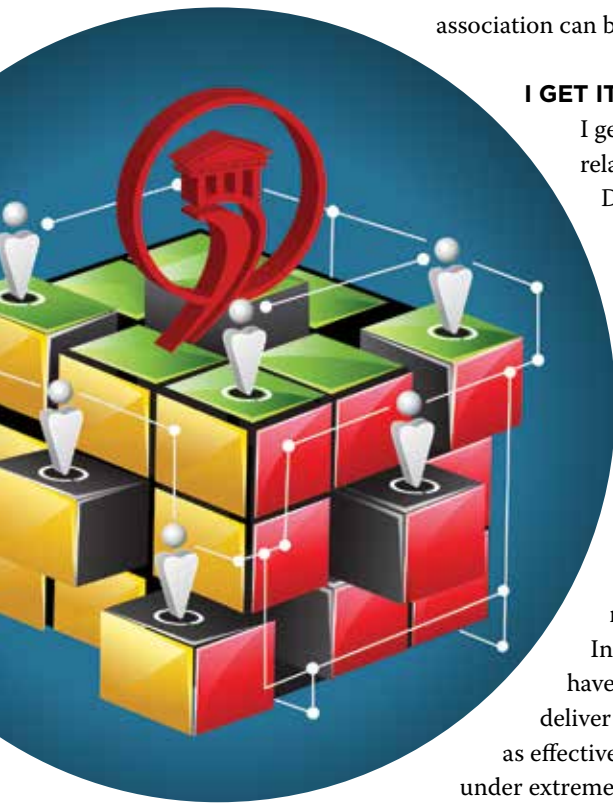
relatively ignored, grounds work was not regarded as skilled labor, and maintenance and custodial positions were rarely seen as professional career choices.

However, I have experienced a phenomenal paradigm shift over the past 40 years. For example, energy management is now viewed as being so important that positions have been developed to focus on that alone. The exterior of a campus has been recognized as having a large impact on recruitment and retention, and building conditions are now seen as a critical element of providing safe and comfortable learning environments for students. Administrators now understand how their decisions impact facilities services, and there is more focus on capital renewal needs than ever before.

IT’S NO COINCIDENCE

I am convinced that these changes are not accidental, but have come about by facilities-related personnel interacting with each other through APPA and bringing about opportunities for sharing, learning, and growing together. APPA’s continual efforts to convince educational leaders of the importance of facilities services have affected every aspect of the educational arena. These efforts have generated a new level of respect, integrity, and professionalism for the industry. So much so that many universities now issue degrees in the field of facilities management, thereby supporting what is now a recognized and respected career.

Institutional leaders today have realized that maintaining their buildings’ structural integrity is crucial, and that maintaining an acceptable FCI (facilities condition index) is critical in keeping operational and replacement costs from climbing into the millions of dollars. There is a need for highly skilled people who know how to maintain both private and public properties. APPA is unique in its ability to provide networking and training opportunities directly related to facilities services for educational institutions through workshops, conferences, materials, and friendship development—all provided by the




people who are directly engaged through its membership. APPA membership is a sound investment and should have a placeholder in facilities operating budgets today.

THE PERSONAL BENEFITS

On a personal level, APPA has had positive impact on my career in numerous ways. I was fortunate that the institutions I have been associated with understand the value of being actively involved with APPA. I have attended training workshops and acquired both the EFP and the CEFPP credentials, which have had a direct impact on my career. I have had the chance to interact with some of the “best of the best” in the facilities industry. My education, experience, and knowledge, along with APPA’s credentialing programs, earned me the respect, integrity, and professionalism I needed to propel my career forward, and provided career opportunities for me to embrace. Not only have I experienced a paradigm shift thanks to APPA’s efforts, but I have been involved in facilities work long enough to see the same positive

changes APPA brought to my life affect the facilities industry as a whole.

APPA is a worthwhile investment for any educational institution and for its most valuable resource: its people. The other choice is not to invest, which makes it more difficult to achieve the excellence you need in today’s business climate. There is an old aphorism that’s right-on today: “Whatever is worth doing at all, is worth doing well.”

Can you (or your institution) afford to settle with just being good enough in today’s competitive environment? I challenge you not only to become an APPA member—but to become an engaged APPA member—because that is when the real benefits of membership are realized. 

Ray Mirizzi is director of operations and maintenance at Northern Kentucky University, Highland Heights, KY. He can be reached at mirizzir1@nku.edu. This is his first article for *Facilities Manager*.



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Leadership and Virtues—Justice

By Joe Whitefield

We began this series on virtues with the premise that they have fallen out of favor with many people and their use is in decline. Perhaps they are a little too old fashioned, or maybe too rigid for our modern, fluid society. Values seem like a better fit. They are less rigid and more customizable for each situation.

It is my observation that the products of this virtues-to-values shift include lower behavioral standards, less integrity, less civility, more regulation, and more confusion. Because of this change, I have attempted to make the case that virtuous leadership, however unpopular, has never been more in need. Thus far we have discussed prudence, courage, and patience; now we will now consider justice.

Justice should be the easy one. Everyone has a basic sense of fairness that is a foundation for his or her view of justice. We all want level playing fields with everyone playing by the same rules. Of all of the

virtues, it is still the one most openly talked about today. More accurately, current events perceived as injustices dominate the news cycle and our discussions of it. Often these events are overly politicized to the point where very little conversation takes place about what the real issues are. This article seeks to take a more fundamental look at justice and its relevance in organizational leadership.

THE LEVEL PLAYING FIELD

The inherent problem with justice is that most of us only want it when we have been wronged by someone else—not so much when *we* are perceived to be in the wrong. When we violate some standard, we often lean much more in the direction of justification: There are always reasons why we acted the way we did. So it is justice for you with all of the appropriate consequences, and justification for me with all of the appropriate exemptions. Like I said, easy.

However, such “good-for-thee-but-not-for-me” attitudes defy justice, contributing to a culture defined by double standards. There is a story that Jimmy Johnson, when coaching the Dallas Cowboys, once cut a player struggling to make the team for falling asleep in a team meeting. Following up on this seemingly harsh punishment, someone asked Coach Johnson what he would have done if his star quarterback Troy Aikman had fallen asleep. Coach Johnson said he would have walked over to Troy and simply asked him to wake up and pay attention. What do you think: double standard or justifiable difference? Either way, double standards and inconsistent behaviors (real or perceived) undermine the faith people place in their organizations and their leaders. Fueled with distrust, some people resort to willful violations of policies, standards, or acceptable behavior. They act on a feeling of justification as they rationalize their increasingly poor or disruptive behavior. Left unaddressed, this unhealthy environment is potentially dangerous.

All of this is to say that leaders have the difficult task of maintaining level playing fields when there are vast differences in employees and in their

“EVERYONE HAS A BASIC SENSE OF FAIRNESS THAT IS A FOUNDATION FOR HIS OR HER VIEW OF JUSTICE.”

individual paradigms of fairness. So here is a thought for the leader wanting to be more just: Enhance efforts at equality with approaches that are equitable.

Very few situations and no two people are exactly alike. As such, equality, if singularly defined as identical, is rarely attainable. However, an equitable approach goes beyond basic equality by accounting for differences and providing individualized responses that are of *equal value*. For instance, my two children chose to attend different colleges.

One was a state school three hours from home, and the other was a private school closer to home. Both situations involved a different combination of financial contributions and various commitments from both parents and children in order to accomplish their educational goals. These college paths and everyone's contributions were not identical (equal), but they were equitable. Both children were given the opportunity to pursue the education of their choice at the school of their choice. By placing an appropriate value on the ability to choose, greater equity was achieved than could be seen on a financial statement or report card.

In an organizational setting, equity should be sought where possible. This means attributing value to opportunities and accounting for inevitable differences equitably. Doing so will have a leveling effect on the playing fields within organizations by reducing the appearance of double standards. Keep in mind, level playing fields do not necessarily produce equal outcomes. However, differences in outcomes can be more easily identified and evaluated if the standards are equal and the expectations are equitable.

THE ORDER OF THINGS

When describing elected governmental leaders in his book *If You Can Keep It: The Forgotten Promise of American Liberty*, Eric Metaxas says that they are "inevitably representatives of the larger order of things." And that a lack of virtue on the part of these leaders plays a decisive role in undermining the entire enterprise of democracy. I believe the same is basically true for organizations. Thus, one of the main goals of any leader should be to help

people maintain faith in the organizational system and its leadership so that the enterprise is successful. To accomplish this, a leader should be virtuous. And a virtuous leader should certainly be just. §

Joe Whitefield is assistant vice president for facilities at Middle Tennessee State University, Murfreesboro, TN. He can be reached at joe.whitefield@mtsu.edu.

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A Profile of President Chuck Scott

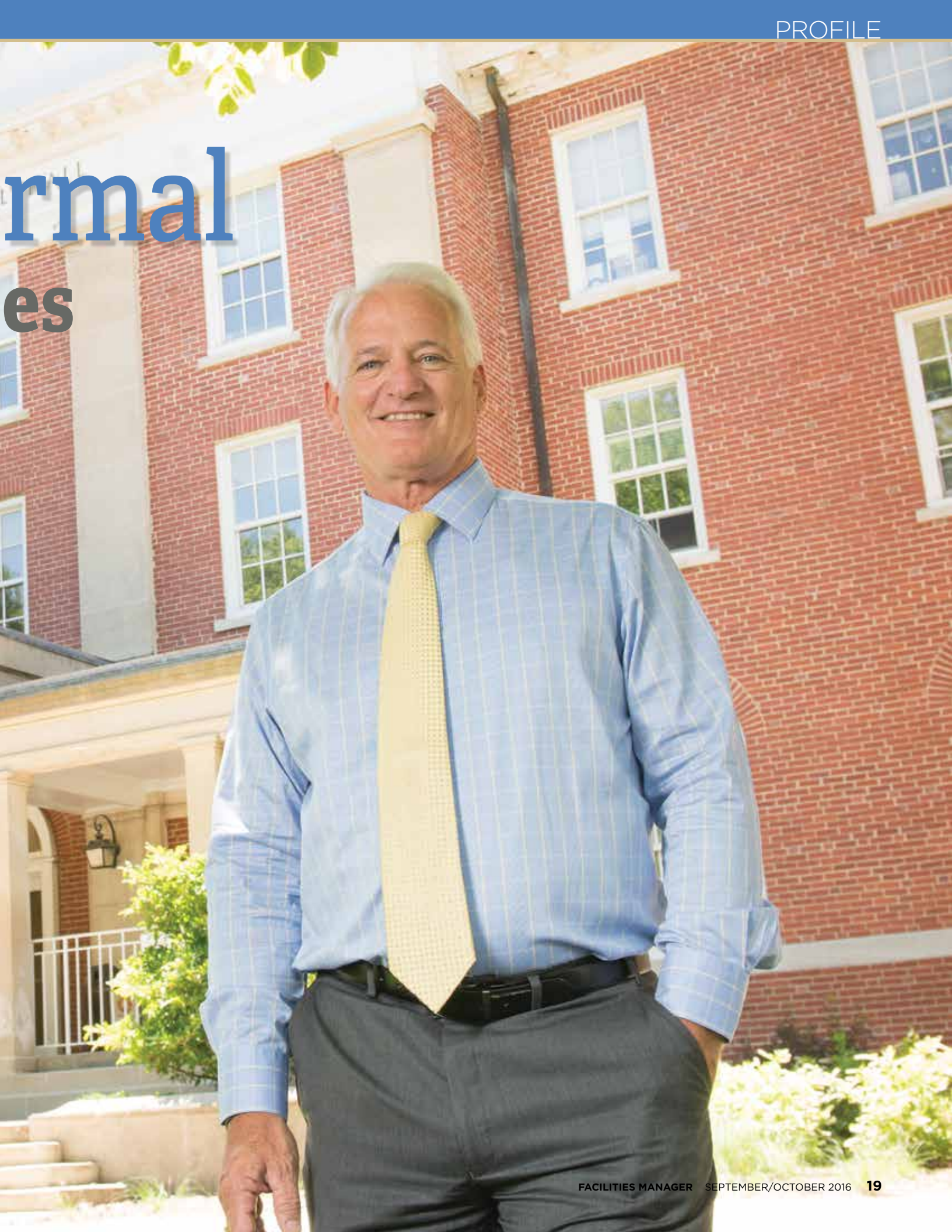
By Anita Blumenthal

When incoming APPA President Chuck Scott was working to become an Eagle Scout in the late 1960s, he formulated a personal mission statement, although he admits he didn't realize that's what it was until decades later, when he was in the APPA Leadership Academy. That statement was, "Always leave a campsite cleaner than you found it." He firmly believes "that statement led me into what I've become. It led me to my work ethic and moral standards. It led me to be a loyal family member, an active community servant, and now, leader of an international facilities management organization."

Although Scott's path to facilities management was not obvious to him, the seeds were sown early. He grew up in rural Illinois, spent a lot of time outdoors with his three brothers, and developed a great appreciation for the environment. He wasn't really aiming for college, but he was attracted to the horticultural program at the local community college and continued on to Southern Illinois University to earn a bachelor's degree in plant and soil science. After eight years in the landscaping business, in 1985 he joined Illinois State University (ISU) in Normal, Illinois as director of grounds maintenance and recycling, and has been at ISU ever since, holding positions as director of campus services, executive director of facilities management, and currently, executive director of facilities management, parking, and transportation.

Photos by Lyndsie Schlink

rmal es





Scott still remembers a high point of his years directing grounds maintenance: He was invited to join the committee to officially establish the campus as an arboretum. It was formally registered as the Fell Arboretum in 1995, named in honor of university cofounder Jesse Fell, who planted the first tree on the campus in 1867 when the institution was 10 years old. The oldest public university in Illinois, ISU was founded as a “normal school,” or teacher training college. The lawyer who drew up the papers to secure its funding was Fell’s friend, Abraham Lincoln.

Today, Fell Arboretum stretches over more than 400 acres of the campus and contains approximately 2,000 trees and other plants, all native to Illinois. In 2008, ISU was recognized as a Tree Campus USA school by the National Arbor Day Foundation and continues to hold the designation today.

UNDERSTANDING AND VALUING DIVERSITY

In his next post as director of campus services, Scott found a new challenge. “In 1994, I was in my late 30s and had always worked with small groups. As director of campus services—covering the campus’s 1,100 acres and more than 200 buildings—I was suddenly responsible for about 270 people with diverse backgrounds,” he explains. “In particular,” Scott says, “the leaders of the building services groups were mainly African American. I quickly realized we came from very different places. What



happened next led me to an ‘ah ha’ moment. We agreed that we would all bring copies of our high school yearbooks to the next leadership meeting. The outcome—in addition to a lot of jokes, mainly about hair—was a change in my own moral fiber. I began to understand the value that diverse perspectives bring to the outcomes of nearly every decision we make. There is no right or wrong way a person comes to a decision; it’s based a lot on personal experiences.”

After that experience, Scott explains, “I developed regular labor-management meetings with all sides sitting around the table to resolve differences before they were set in writing in the form of grievances. We created trusting relationships so that people could feel free and comfortable enough to call each other on issues without fear of retaliation.”

Today, Scott oversees all human resources functions related to his position, which involve over 400 employees represented by eight separately negotiated union contracts. “Unions bring a different set of rules we have to abide by,” he says. “If you understand them and they understand our parameters, contracts, and needs, we can work together to make ISU a better environment for all. We are all here to provide a better student experience.”



ISU is in the midst of demolishing the four residence towers of the south campus complex. Scott explains, “We provided the administration with the information it needed to make the decision: information on the condition of the facilities, estimates on the cost to bring the facilities up to code, and what we would have at the end if we did that.” The administration decided to demolish the residence towers and build a new residence hall complex elsewhere, leaving an open city block for future use.

USING APPA ON CAMPUS

Early in his career, Scott began using APPA guidelines for custodial and grounds functions, and he benefited from the solid data the guidelines supplied. “I used the data in an argument that we either had to increase custodial staff or change our delivery model of services. The custodial department did not have enough money for more staff,” he says, “so I marketed the idea to the administration by saying, ‘We are going to change some of our cleaning methods—and here’s why.’ It worked. The same thing happened with grounds,” he says. “We used the APPA guidelines to develop a system where we cover more acreage per worker but we hold certain parts of campus to a higher standard, and the ‘back 40’ can look a bit more fuzzy.”

As executive director, Scott used APPA’s Operational Guidelines data to persuade the administration to hire a firm to conduct a facilities condition assessment. “It was in 2003,” he says, “and for the first time, I put the term ‘deferred maintenance’ into the minds of the board of trustees. While the assessment was expensive, it provided the board with information they had not had before, so that now they could understand our needs.”

Repeatedly, Scott has found that the guidelines “provide data and credibility for what I am asking for from the administration—somewhat equivalent of a third-party opinion.”

Scott also uses APPA resources with his own staff, bringing APPA professional development tools to the ISU campus and encouraging his staff to begin their own APPA journeys. Over the years, he says, he has sent over a dozen of his staff to the Institute for Facilities Management or the Leadership Academy. In fact, Kristie Kowall, his assistant director for administrative

services, succeeded him as president of APPA’s Midwestern region (MAPPA) and is currently chair of regional representatives on the APPA Board of Directors.

“I’ve brought the Supervisor’s Toolkit to campus twice and have hosted Drive-In Workshops,” Scott says. The Toolkit yielded multiple benefits. “Often, departments are working across multiple shifts and varying days off at different zones on campus,” he explains. “The Supervisor’s Toolkit program involved 40 supervisory staff and lasted four full days; it was a face-to-face opportunity to build relationships. Also, it gave frontline supervisors a first look at what is it like to be a supervisor—how to lead versus manage.”

Scott’s management style—both on campus and at APPA—is participatory. “I give people opportunities to make their own decisions, to do things as they wish,” he says. “But if they start to go over a cliff, I intervene and explain why.”

TWENTY-FIVE YEARS WITH APPA

Scott’s own APPA journey began in 1991, when his supervisor invited him to attend his first APPA conference. Scott’s initial reaction was very positive. “I liked the APPA focus on professional development,” he says. Within the next few years, he completed APPA’s professional development and leadership programs and then became involved at the regional level in MAPPA, first volunteering to be the Illinois representative on the membership committee and then chairing the committee. He served as regional president before joining the APPA Board.

Once on the APPA Board, Scott served on the Regional Relationship Task Force. The first time he ran for Vice President

THE SCOTT FAMILY JOINS THE SPECIAL OLYMPICS

Scott recounts this story: “During the spring of 1986, I was told of an event that was going to occur on campus. I was told to place extra trash containers throughout the athletics and residence hall areas. Given the large number of containers required, I decided it would be in my interest as superintendent of grounds to check them throughout the weekend. Once on campus with 10,000-15,000 Special Olympics athletes and families, I quickly learned what joy we were bringing them by hosting their summer games on our campus.

“The following year, I took vacation days to volunteer in any way that I was needed. This quickly grew from being a volunteer at the softball throw, to a key volunteer in the summer games planning process, to a running long-jump venue director, to a board member, and ultimately to serve as the chairman of the board of directors for Special Olympics Illinois. During the course of the past 30 years, I served on several committees, my wife became a venue director herself, and our children became annual volunteers and were present at all of the events. This group of very special people had a passion for what they were doing, exhibited the true meaning of sportsmanship, and truly appreciated the time and energy we put forth. Thus, it just became a part of the Scott family culture to give back.”



Scott leads the ISU facilities leadership team.

for Professional Development, he lost. But six months later, the incumbent had to resign. Scott was asked to fill the spot for the rest of the term, and he did. Then he ran again and won. In that role, he says, “I was particularly inspired by Glenn Smith, who said that deferred professional development is more critical to address than deferred maintenance. If professionals who address deferred maintenance did not have leadership skills and know the latest technology, the deferred maintenance issue would not be resolved.”

As VP for Professional Development, Scott helped create the new APPA Board position of chair of regional representatives, and he arranged for a task force of members to conduct a third-party evaluation of the Institute for Facilities Management. “Their recommendations are currently being implemented,” he says.

Scott also started developing “Navigating the Facilities Portfolio,” a graduate program for APPA U. “Jim Jackson of the University of Nebraska-Lincoln and I worked through two beta graduate programs,” he says. “Now we are out of the beta stage, and the graduate program was available for the first time in September 2016.”

THEME FOR THE YEAR: CREATING A NEW NORMAL FOR APPA

Scott is setting the tone of his tenure with the theme “Creating a New Normal.” Says Scott, “We really need to conduct our work in a different manner than before to align ourselves with our universities’ missions and the shifting sands of higher education and higher education finance.” His plan for the year is to build on the work of his predecessors (set out in

the strategic plan), engage members, and develop action items under three pillars.

The first pillar is to redefine the association—for example, with an association management system so APPA can provide more and better data to members. “I want to put APPA tools and resources online so that members can use them anytime and anyplace that’s convenient for them,” Scott says. The second pillar is to remake the organization. “I want the Thought Leaders Series to focus on customer service,” he says, “and on how facilities associations can break down the silos that have existed within the organization (rather, I call them ‘cylinders of excellence’) to merge them with the common good for a better student experience.” The final pillar is to reinvent the individual; two ways to do this are through credentialing and through enhancing opportunities for individuals to access professional development offerings.

FAMILY MAN AND VOLUNTEER COACH

Scott and Vicky, his wife of 41 years, have two grown children. Their daughter Erin lives locally, and Erin’s six-year-old daughter, Lexi, is one of the joys of Scott’s life. His son Brian and his daughter-in-law Ali live in neighboring Indiana. Part of Scott’s long record of community volunteering tracks his children’s growing up: Cub Scout leader, baseball coach, soccer coach, and wrestling coach. He coached up to middle school age—“a very formidable age,” he admits. “I tried to impart what it is to be on a team and support one another. This was a great age to help shape the lives of these kids. I liked giving them the opportunity to learn.” (See sidebar for the Scott family’s special relationship with the Special Olympics.)

BRINGING HIS SKILLS TO THE COMMUNITY—CREATING A NEW NORMAL, ILLINOIS

Eventually, Scott moved from coaching to serving the broader community. He prepared for civic leadership in a number of ways. In 1994, after six years taking one course per semester, he earned his master’s in political science from ISU, with an emphasis in public administration. He also completed a year-long leadership course sponsored by the county Chamber of Commerce. He began serving on town committees and task forces focusing on “visioning” for the future—addressing physical assets, economic development, and business and how all the pieces fit toward a master plan for the town (the New Normal).

In 2007, Scott was elected to the first of his two terms as at-large Town Council member representing the 54,000 residents of Normal, serving until 2015. That was good timing. With his strengths in facilities, budgeting, and understanding public finance, Scott was well positioned to contribute when Normal received a Transportation Investments Generating Economic Recovery (TIGER) grant of \$22 million in 2010 to build a multimodal transport facility, which spurred other redevelopment including a new town hall and a public works facility—all LEED certified. He points out that Normal “became the first commu-

nity in the nation to codify LEED requirements for town-funded facilities larger than 9,000 square feet.”

Scott is proud of his town and also of his university of over 20,000 students. ISU appears on *U.S. News and World Report’s* list of Best National Universities and is one of *Kiplinger’s* Top 100 Best Values in Public Colleges. It has an enviable graduation rate within the top 10 percent in the country and an 81 percent retention rate.

“This is a great campus,” Scott says, “a friendly, welcoming community. ISU President Dietz is very supportive of my participation in APPA. He sees this as something good for me and also good for ISU. The university understands there is a really strong alignment between the quality and condition of facilities and the ability to attract the best students, faculty, and staff.”

APPA’S CULTURE OF SHARING

At the threshold of his year as President, Scott looks back with gratitude to such colleagues as Mary Vosevich, “who helped me understand the concept of the APPA journey and how each experience would lead to the next,” to Polly Pinney, who encouraged him to run for President, and to David Gray, “who exhibited what it was like to be presidential.” He also has a great deal of respect for Randolph Hare in leading APPA in developing a new strategic plan and for APPA staff in helping to implement it.

Looking forward, Scott is excited about APPA’s engaged membership and the focus on campuses. “One thing special about APPA,” he says, “is that we’re willing to share anything. There’s no competition (except to attract students), and there’s a willingness to help that I have not found in other associations. We’re willing to share best practices and tell about failures. After all, we all have the same kinds of facilities issues.” ☞

Anita Blumenthal is a freelance writer based in Potomac, MD. She can be reached at anitablu@earthlink.net.



By Ruth E. Thaler-Carter

Meritorious Service Award Recipients and New APPA Fellow

Reflect on Value of
Service



Familiar names in the APPA family are the proud recipients of APPA's highest-level recognition for individuals in 2016: the Meritorious Service Award and APPA Fellow. These honors, presented this July at the APPA/SRAPP/TNAPPA Annual Meeting and Exposition in Nashville, reflect decades of dedication to both the profession of facilities management and the association serving the profession—dedication that includes continuing to be involved with APPA even in retirement or at personal expense.



2016 MERITORIOUS SERVICE AWARD RECIPIENTS

J. B. Messer of the Community College of Allegheny County has been CAPPAs' (Central Region) president; Finance Committee chair; Junior and Senior Representative to APPA; member of the CAPPAs and OACUPPA (Oklahoma Chapter) Inaugural Board of Directors; Membership chair/APPA Membership Committee member; and APPA Community College Engagement Group cochair. He received APPA and CAPPAs Emeritus Member status in 2014.

Messer brought all of the community colleges together within APPA. He led a task force on integrated membership between the international and regional levels.

According to nominator Sue-Anna Miller of University of Oklahoma Facilities Management, Messer "was consistently and highly involved at all levels of APPA.




Further, he encouraged others to also engage through his enthusiasm and positive outlook." He is credited with having "resurrected OACUPPA through his encouragement and engagement of others in the state of Oklahoma ... and overseeing the establishment of the organization as a not-for-profit corporation and the creation of associated bylaws and a leadership succession plan."

Despite the budget constraints of working for a small community institution, Messer also "was a strong encourager of other community colleges and smaller schools, promoting collaboration and cooperation as a means to growing a smaller school into a big leader.

J. B. himself epitomized this idea, being one of the boldest leaders on the CAPPAs Executive Committee for many years, always bringing new ideas and fresh perspectives," says Miller. He made sure that his staff attended APPA training and events, even if it meant he could not attend himself.

Messer's commitment to APPA is grounded in how membership has helped him personally and professionally. In his early years in the profession, he worked at institutions where there was no development budget. "Our institution was a member of APPA, but just contributing money—not even being a drain; not doing anything," he recalls. His APPA journey really began when funds became available and he went to a regional meeting. From then on, "I told everyone in our group to be a part of APPA," he says. "I wanted them to be involved, not just take."



APPA involvement “made us a better, more professional department,” says Messer. He gets “more gratification from seeing results in all the people around me” than in recognition for himself.

APPA colleagues may not know that Messer began his career as a nuclear engineer with the Navy, then served for years as the senior facilities officer at Oklahoma City Community College. A year after his initial retirement from higher education, “I knew I really loved what I had been doing,” says Messer, “so I accepted a job with the community college system of Pittsburgh. I can’t imagine doing anything else. It’s challenging, rewarding work with great people.”

Receiving the Meritorious Service Award means “I’ve stayed around long enough,” says Messer with a chuckle. “It isn’t just about me, but about bridges to all the people I have worked with and what they’ve achieved—it’s much bigger than myself.” ■

Glenn R. Smith

who recently retired as director of facilities services at Bryn Mawr College, reached APPA’s highest office, serving as APPA President in 2013-14. He previously served as APPA’s Vice President for Professional Development and dean of the APPA Leadership Academy; as well as Eastern Region’s president, then Junior and Senior Representative to the APPA Board; ERAPPA’s education chair; and president, Delaware Valley Chapter.



Smith “has received many awards through the years, and is deserving of those and many more, but his steadfast goal has always been about the greater good, not personal recognition,” according to nominator Dale DeBlois of Colby College. “His unwavering positive attitude in promoting the educational facilities field has been felt

from his chapter to his international influence as President of APPA. He has advanced our profession to a point that will be felt for generations ... He has proven to be a champion as well as a mentor to many fellow facilities individuals, as well as expanding programs ... so they will serve us all into the future.”

To Smith, APPA members “have certainly afforded me leadership opportunities that went beyond those in the job. What I’ve learned from APPA and other members has helped me be a better director of facilities.”

Having an APPA colleague (Fred Klee of Ursinus College) reach out and encourage him to run for APPA office gave Smith an early and lasting appreciation of “how important it is for each of us to do that for other members,” he says. Membership and constant service over the years has also “helped me better understand what we’re going through in APPA now and what institutions are facing, in terms of the number of students decreasing, more intense competition for those students, and how schools are competing, such as through constructing more buildings—all of which have to be maintained, and the importance of total cost of ownership,” he says.

The award came as a surprise to Smith. “I felt I’d been recognized enough, so this was kind of over the top, but it’s all about the service,” he says. “None of us had awards in mind when we volunteered with APPA. We did so for the true joy and happiness that comes with service, either [for] an institution or other people—this is for both.”

Smith is enjoying his retirement enough that he recently and “gracefully” declined the offer of an interim position in northern New Jersey. APPA friends and colleagues will be glad to hear, however, that “Lander (Medlin) doesn’t let you go easily,” so he is still involved in the Leadership Academy. “I’m looking forward to more time to present that locally,” he says. His wife Sue is also qualified to teach in the Academy, and they are looking for opportunities where they “can be in the classroom together, learn from each other, and make the classes better.”

Continuing to serve even in retirement is yet another way that Smith gives back to the association and the profession. “APPA’s done so much for us that I can’t imagine not being involved,” he says. If this behavior becomes a trend, APPA may need to create a whole new award! ■



appropriate backgrounds, but we needed help with addressing issues. We became more aggressive about APPA, which led to a whole new series of resources focusing on the same issues as at larger schools.”

Young sees this recognition as one to share rather than belonging only to himself. On receiving the award, Young recalls that “the first thing I said was, ‘I thank my God for giving me the ability to do this work. Second, I thank my wife for the same reason. Third, I thank the members who made it possible.’” ■

F. Daniel Young

has been
MAPPA

representative (Midwestern Region) to the APPA Membership Committee, served on the GAPPA Board of Directors (Georgia Chapter), and as SRAPPA president (Southeastern Region), APPA Junior and Senior Board Representative, APPA Historically Black Colleges and Universities (HBCU) Committee member, and FLAPPA president (Florida Chapter).



“Dan was the driving force in the formulation of the Florida Chapter, and because of his direction, it has flourished since being established,” says nominator Rebecca Griffith of Embry-Riddle Aeronautical University. “Dan has attended International, Regional, and Chapter meetings throughout his career for the past 47 years, and has supported APPA International from the moment he joined. You will

not find a more loyal member.”

According to Griffith, “If anyone from APPA or SRAPPA asked him to serve in any capacity, he would do so without a moment of hesitation ... (his) current school does not ... support his travel to the SRAPPA and APPA meetings, but he still attends, paying the costs personally. Now that’s commitment.”

Young is also renowned as a mentor: “When we worked together, I considered him my Book of Knowledge,” says Griffith. “He taught me many, many valuable facilities and life lessons that you cannot learn anywhere else. Dan Young is one of a kind. He can be counted on to make the best decision possible for whatever institution he is working for.”

Throughout his career, Young has seen APPA grow in its range of services and its inclusion of different kinds of higher education institutions. “When I was starting out as a physical plant director before APPA started to spread its wings, there were a number of affiliated smaller colleges,” Young recalls. “We were finding that the larger the institution, the bigger the hat, but the smaller the institution, the more hats we wore. A lot of us had



2016 APPA FELLOW

John P. Morris, associate vice president of Northern Arizona University and the 2016 APPA Fellow, has been in APPA for 25 years, during which he graduated from the Institute for Facilities Management and Leadership Academy; produced a Center for Facilities Research (CFaR) project entitled *The RMA 14ers Club: A Model for Facilities Mentoring*; and wrote two booklets for Rocky Mountain APPA (RMA), *Fifty Years of RMA: A History of the Rocky Mountain Association of Higher Education Facilities Officers*, and *A Sixty-Year Celebration: The History of Rocky Mountain APPA 2003 to 2012*, as well as several articles for *Facilities Manager* magazine, including “A Study on Mentoring within APPA” (July/August 2015). He has been historian, secretary/treasurer, and lead climber (program coordinator) on the RMA board of directors; Senior Representative to the APPA Executive Board of



Directors; member and chair, APPA Credentialing Board; chair, APPA Mentoring Task Force; a member of three regional annual conference host committees; and participated in the Thought Leaders Series and on six Facilities Management Evaluation Program (FMEP) teams.

“As with many people in our profession and members of APPA, I started my APPA journey by going to the APPA Institute for Facilities Management,” Morris says. He later went to the APPA Leadership Academy in 2001, and started going to regional RMA meetings in the early 1990s. He has been so involved because “I love our business—we do not directly teach students on a daily basis like faculty, but facilities management plays a large part in the student’s experience,” he says, “and it is

cool to be around all the research and culture that takes place on campus.”

Morris also has a passion for APPA and RMA. “There are some very intelligent, dedicated, and passionate people in these organizations, and who doesn’t want to be a part of that?”

While he belongs to other organizations, APPA is Morris’s

network of choice. “I have received a lot from these organizations and feel compelled to give back whenever possible,” he says. “I also had plenty of encouragement to step out of my comfort zone to get more involved, and I have never regretted saying ‘yes’ when called upon.” In large part, that is because “I saw the advancement in my career parallel my involvement in

RMA and APPA,” he explains. “I knew more about our business from reading what others in the organization wrote or talked about, I made contacts that helped me professionally, and I gained a personal level of confidence that I may not have had if I had not stepped out of my comfort zone when encouraged—and sometimes nudged.”

Longstanding APPA involvement has had more than professional benefits, Morris adds: “I can honestly say that many of the people I have met in RMA and APPA have become lifelong friends as well as peers and colleagues.”

For Morris, “the Fellow Award is the pinnacle of my professional development. Being recognized by your peers is very rewarding, although I never really was in it for the recognition. I just sort of stepped up when asked.”

Like his fellow award recipients, Morris has no plans to reduce his involvement in APPA, despite reaching this apex of recognition. “I hope to continue contributing to APPA, its regions, and our profession to the best of my abilities,” he says. “I had many people help me along my APPA journey, and I only hope that someday someone looks back and thinks of me helping them with their achievements. What a legacy that would be!” ☺

Freelance writer/editor Ruth Thaler-Carter has been writing for APPA publications since 1988. She can be reached at ruth@writerruth.com.

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Bill Daigneau is a Colorado-based consultant and writer who retired in 2012 from the University of Texas MD Anderson Cancer Center in Houston, Texas, where he served as vice president and chief facilities officer. He is an APPA Fellow and a four-time recipient of APPA's Rex Dillow Award for Outstanding Article.



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*New Mexico State, Ohio State, and UT San Antonio
Receive APPA's 2016 Award for Excellence in Facilities Management*

Leadership Flourishes at AFE Recipient Universities

By Glen Haubold, Brett Garrett, and David J. Riker

The APPA Award for Excellence recognizes and highlights the essential role of facilities operations in the mission and vision of an institution. Established in 1988, the Award for Excellence is APPA's highest institutional honor and provides educational institutions the opportunity for national and international recognition for their outstanding achievements in facilities management.

The award criteria focus on excellence in the areas of leadership, strategic and operational planning, customer focus, information and analysis, development and management of human resources, process management, and performance results. This article will focus on the leadership component of the AFE criteria; the text is excerpted from the institutions' applications.

New Mexico State University

Las Cruces, New Mexico

*Submitted by Glen Haubold, associate vice president,
facilities and services*



New Mexico State University's (NMSU) main campus sits on 625 acres and enrolls more than 15,000 students from 49 states and 89 foreign countries. NMSU is a NASA Space Grant College and a Hispanic-serving institution with a multicultural population of students and community members across the state at five campuses, cooperative extension offices located in each of New Mexico's 33 counties, and 12 agriculture science centers.

NMSU's Office of Facilities and Services consists of the Project Development and Engineering group that manages both capital construction and small remodel projects for the NMSU System; Facilities Operations, which is responsible for the physical operation and maintenance of the main campus; and Environmental Health and Safety, a unit that is responsible for environmental compliance and safety. Facilities Business Administration provides oversight of the financial and business operations; the sustainability manager makes sure that sustainable practices are incorporated into all of our activities; and the university architect and Campus Planning office oversee the NMSU Master Plan and space management initiatives.

NMSU Facilities and Services employs numerous strategies to set organizational direction and tone. We constantly seek feedback from employees, from external customers, and from faculty, students, and staff, as well as from the research, academic, and administrative unit leadership. As leaders, we stress continuous improvement, accepting constructive criticism and adapting to our ever-changing environment. Our managers and directors attend shop meetings and hold departmental meetings, and each one meets regularly with their direct reports.

ALIGNING THE FACILITIES MISSION TO THE UNIVERSITY'S MISSION

Mission and value statements have been completed and a departmental strategic plan has been developed. Facilities worked actively with Administration and Finance to complete the division plan and finalized the framework for the unit plan. NMSU Facilities and Services established goals using the APPA Award



Glen Haubold, center, and his facilities leadership team.

for Excellence criteria as our Outline for Excellence.

We are known for our communications on campus. We issue regular newsletters and share them with the campus. We hold annual meetings with our building monitors; we e-mail outage notices when our work impacts users; and all units and shops meet regularly as a group and individually.

Facilities and Services management briefs the Academic Dean's Council and the University Research Council when possible. Facilities and Services conducts regular meetings with building monitors and deans; meets monthly as a representative to the University Administrative Council; and has presented at CADRE, the Council of Associate Deans for Research.

PERFORMANCE MEASURES ARE CLEARLY DEFINED

NMSU Facilities and Services has developed benchmarks and Key Performance Indicators (KPIs) at every level, taking pride in the fact that we are one of a handful of units on campus that actually measure performance. Our Vision 2020, the system strategic plan, established a complete set of KPIs. When the

Administration and Finance Strategic Plan was developed, we revisited all of our KPIs to ensure alignment. Each unit has its own set of performance measures that are embedded down to the operational level, and all directors and managers have these written into their performance evaluations for clear expectations and performance measurement.

A major component of the Administration and Finance Strategic Plan was the empowerment of employees and decentralized decision making. Empowerment was a major theme of the Administration and Finance Strategic Plan. Although we were already encouraging decision making at the lowest possible level in Facilities and Services, we seized this opportunity to reemphasize our commitment to empowering our employees and fostering self-direction.

It is particularly challenging to emphasize empowerment while simultaneously focusing on continuous improvement, because supporting empowerment requires a commitment to allowing people to make decisions, and that only becomes possible in an environment where learning from mistakes is encouraged. In many instances, the higher-level organizational processes that guide our personnel could be more conducive to self-direction, innovation, and decentralized decision making. We believe that the best way to develop empowerment is through effective delegation that establishes boundaries, procedures, and processes that are minimal, while providing a framework for effective self-

direction and an environment that allows people to learn from the consequences of their decisions. Where possible, we develop our processes around this approach.

The Office of Facilities and Services will remain involved with APPA, Rocky Mountain APPA (RMA), the International Sanitary Supply Association (ISSA), and other professional organizations, and will take advantage of continuing education and networking opportunities. Senior staff has been attending APPA's Leadership Academy. Numerous staff members have enrolled in various phases at the Leadership Academy and at APPA's Institute for Facilities Management. NMSU has hosted the Supervisor's Toolkit program on campus three times, and we have numerous graduates on staff.

Despite university-mandated budget reductions in 2010 and in 2015, Facilities and Services has been able to increase its level of professional development and professional association engagement, because we believe that doing so is vital to the organization. Facilities and Services encourages all employees to make a self-improvement plan and discuss it with their supervisor.

LEADERSHIP CONTINUITY

Facilities and Services specifically encourages high-potential employees to work on professional development, and we track in-house promotions as a performance measure. Supervisors at each level designate and develop an informed management

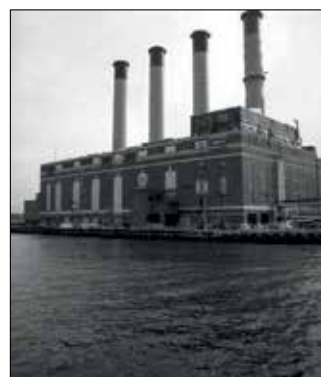


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backup for times when they are away at professional development programs. While this is a hallmark of customer service, it also means that we are continually training to be at least “two-deep.” Through the normal course of events, we recently had to address the loss of the senior administrative assistant, the university architect, the space manager, and the senior assistant director of project development and engineering—we had people ready to step in as interims almost immediately.

In addition, Facilities and Services encourages high-potential

employees to become engaged with numerous activities that help ensure continuity; two members of Facilities and Services are enrolled in the Aggie Leadership Training Academy (ALTA)—one is from the Office of Environmental Health and Safety and one is from the utility group at the Central Plant. This program was started recently at NMSU for the sole purpose of grooming our campus leaders. The associate vice president of facilities and services served on the program development committee. ■

The Ohio State University

Columbus, Ohio

Submitted by Brett Garrett, technical services director and special assistant to the associate vice president

The Ohio State University's Department of Facilities Operations and Development (FOD) is led by Mary Lynn Readey, who has served as its associate vice president since 2009. Under her leadership, FOD is a well-structured organization of nearly 1,000 employees. Supporting upwards of 500 buildings on nearly 1,800 acres, the department and its leadership are divided into several operational categories:

- Administration (top leadership, performance metrics, university engineer)
- Design and Construction (development and oversight of construction projects, contracts administration, prevailing wage requirements, building design standards, building code compliance, utility geographic information systems/mapping, utility marking, surveying)
- Operations Services (day-to-day maintenance and custodial services divided among three service-area districts, including second and third shifts and weekend service)
- Operations Support (consolidated efforts for campus-wide Landscape Services, contracted custodial work, Energy Services and Sustainability, Building Automation, the stockroom, vehicle and equipment maintenance, exterior lighting, fire safety systems, roofing, sheet metal, flooring, lock and key services, solid waste management, recycling)
- Utilities (power plant, chilled water systems, steam fitters, high voltage, utilities automation, utilities electrical)
- Environmental Health and Safety (environmental affairs, radiation safety, occupational health and safety, research and biosafety, biosecurity, Wexner Medical Center safety, hazardous waste, compliance)



The Ohio State University campus.

FOD'S MISSION

In support of the university's strategic goals and academic plan, we will work to ensure excellence in all facility services by providing a seamless and unified support and delivery organization.

The FOD mission supports the university's vision, mission, values, and core goals. One of the university's core goals specifically embraces FOD's mission: Resource Stewardship—to become the model for an affordable public university recognized for financial sustainability, unsurpassed management of human and physical resources, and operational efficiency and effectiveness.

Communication with both customers and staff is key to our service model. With such an expansive Columbus campus, FOD has divided its service area into three geographical districts,

further divided into nine zones, plus second, third, and weekend shifts. And in these locales, FOD works with “building coordinators” who serve as liaisons to building occupants. This model affords FOD leadership an opportunity to have informal one-on-one communication with its customers and address customer issues before they rise to the critical level.

In addition, at least once per semester, FOD’s leadership meets more formally with campus customers and building coordinators to share pertinent service and operational information within their geographic area. FOD follows a multistep process to spur attendance at these Customer Service Forums:

- Well in advance, Zone Leaders schedule the meeting through Outlook to accommodate availability of the greatest number of attendees and provide a basic agenda.
- Zone Leaders conduct a personal one-on-one conference, encouraging attendance and eliciting attendees’ items of interest.
- About 3-4 days before the meeting, Zone Leaders send a reminder with an updated agenda highlighting attendees’ items of interest.
- Within 3-4 days after the meeting, Zone Leaders send a summary sheet itemizing bullet points of the discussion, so build-

ing coordinators can disseminate the information to building occupants.

These meetings, along with sharing random work order surveys, annual surveys, and daily customer interactions, are a few examples of how FOD communicates with customers concerning items that impact their day-to-day lives.

Communications with staff include the following:

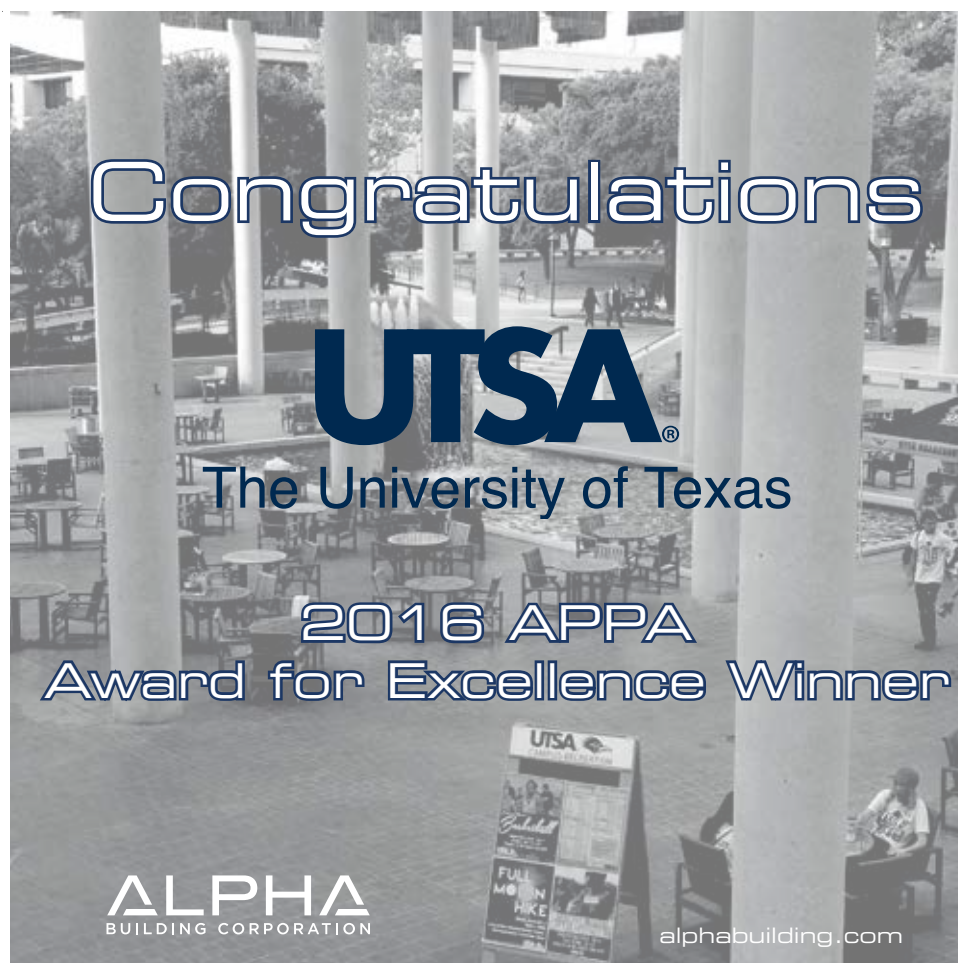
Print & Post—FOD’s biweekly staff announcements contain highlights of FOD’s work and reminders about university announcements; they are e-mailed to staff members and printed and posted to bulletin boards in break rooms for our noncomputer users. These publications proved to be so relevant and popular that they were expanded to serve all of FOD and the five other departments in the Office of Administration and Planning. Now, the biweekly “A&P Announcements” are sent to the 1,450-plus members of Administration and Planning, in addition to a monthly newsletter with articles of interest focusing on staff accomplishments.

FOD Operations Today—FOD supervisors meet regularly with staff to address daily issues and achieve established goals and to share *FOD Operations Today*, a daily communication that highlights basic tenets of exceptional customer service, reinforces

safety, shares staff kudos and items of daily interest, and address questions for leadership.

Digital Signage Boards—FOD utilizes 15 digital signage boards throughout its satellite locations across campus to reach staff members in real time concerning departmental and university announcements, staff profiles, breaking news, etc., with both static and video/audio presentations. FOD has the ability to live-stream critical campus events. The investiture of Ohio State’s 15th president, Dr. Michael V. Drake, is a typical example. The video productions are archived at Administration and Planning’s YouTube channel and are available for viewing at one’s convenience.

Annual Meetings—In addition to FOD’s associate vice president visiting all of the shops throughout the year, FOD hosts an annual meeting to update its nearly 1,000 staff members about the organization’s goals and to answer questions. This forum recaps the prior year’s work and outlines the overarching goals and projects anticipated for the coming year.



RELATIONSHIP WITH APPA AND OPPORTUNITIES TO STAY INFORMED

Ohio State has been involved with APPA since its beginning in 1914, when William McCracken and representatives from six other universities first met to learn best practices from each other. In addition, many of our staff members have held active leadership roles in MAPPA throughout the years, the first record of which dates back to November 1953. Ohio State has graduated many of its supervisors through the Supervisor's Toolkit program. FOD's senior administrative director of operations support, Mike Dixon, coauthored a chapter in APPA's 2014 book *Effective and Innovative Practices for the Strategic Facilities Manager*, entitled "Physical Plant Public Relations." It speaks to an advanced knowledge of communication and keeping customers informed of plant operations. Our staff members have been active attendees at various MAPPA confer-

ences throughout the years and welcome these opportunities to network with colleagues.

FOD is an active host of the Big Ten and Friends conferences, sharing its knowledge and benchmarking with approximately 20 universities in attendance. These conferences are dedicated to specific subject matter for university architects, energy and mechanical personnel, and facilities managers. And we recently hosted the Big Ten and Friends' Facilities Manager Conference, Mechanical Energy Conference, and Midwest Landscape Architects and Grounds Managers Conference.

These are some of the more notable examples of how Ohio State actively learns and shares key benchmarking and industry trends, in addition to attending other various trade conferences and workshops. ■

University of Texas at San Antonio

San Antonio, Texas

*Submitted by David J. Riker,
associate vice president for facilities*

The University of Texas at San Antonio (UTSA) has a student enrollment of nearly 30,000 and 5.4 million gross square feet of physical plant. Senior leadership at UTSA's Office of Facilities effectively sets direction and establishes a strong customer focus along with crystal clear and highly visible common values, its high expectations well aligned with the institution's mission, vision, and core values.

Like the institutional leadership team, UTSA Facilities leaders guide the facilities organization toward excellence by focusing on becoming a world-class facilities organization through strategic improvement in all areas. This includes the seven criteria of the National Malcolm Baldrige Quality Award, as well as the APPA Facilities Management Evaluation Program (FMEP) and the APPA Award for Excellence, in addition to high achievement in other areas, including sustainability, education, collaboration, and student engagement. UTSA facilities leaders continuously inspire employees and have created a positive environment that attracts top-notch staff in a highly competitive facilities management market. Facilities leaders perceive themselves as educators, change agents, and leaders in excellence.



UTSA's "Sombrilla" shaded outdoor common area, is at the heart of the campus, and the foundation of the campus masterplan.



Spirited students express their support at UTSA Downtown campus.

UTSA Facilities is a “full-service” facilities management organization, structured, staffed and funded to plan, provide, manage, maintain, and operate all facilities and infrastructure at the institution’s four campus locations. Facilities’ lean functional organizational structure is designed to maximize the effectiveness of services provided to the university community. Four senior leaders report directly to the associate vice president for facilities, who serves as the chief facilities officer and directly reports to the vice president for business affairs. All of the AVP’s direct reports have clearly defined roles and responsibilities in their respective organizations: Facilities Planning and Development; Engineering and Project Management; Operations and Maintenance; and Business and Customer Services.

The AVP for Facilities and all direct reports conduct regularly scheduled staff meetings within their areas of responsibility. A Facilities “All Staff” meeting is typically held quarterly, where major Facilities projects, initiatives, and accomplishments are reviewed and employees are recognized for outstanding service. Newly hired employees are introduced, internal promotions and employee awards are celebrated, and guest speakers provide information and training presentations for staff. Employees are also afforded additional opportunities to provide input to departmental leadership at “All Staff” meetings.

All employees receive regular evaluations from their supervisors and have the opportunity to provide feedback as part of this process. The facilities department has regular, recurring scheduled meetings both within specific departments and for the entire facilities organization, where operational aspects are discussed and employees are provided opportunities to offer input and recommend improvements.

UTSA Facilities has taken extraordinary care to align the Facilities Strategic Plan with that of the institution. In 2006, UTSA’s president and the Executive Leadership Council, including the AVP for Facilities, met off-site for the first UTSA Strategic Planning Retreat that resulted in the development of the UTSA Strategic Plan, *A Shared Vision: UTSA 2016*. The plan identifies five primary initiatives, each with associated goals that feature the promotion of diversity, globalization, and transformative leadership as foundational themes. An implementation plan for the UTSA Strategic Plan was approved in December 2007. A significant feature of the implementation plan was the establishment of tactics to achieve specific goals supporting strategic initiatives. Each tactic was assigned performance metrics, responsible units, resources, and a schedule for achievement.

Concurrent with this work, the Vice President for Business Affairs (VPBA), with involvement from Facilities senior staff, began developing the Business Affairs Strategic Plan, known as “Business Affairs 2016,” which was also approved in December 2007.

Similarly, the AVP for Facilities held a strategic planning retreat with senior Facilities managers and volunteer Facilities employees to begin development of the Facilities Strategic Plan.

The discussions included analysis of strengths, weaknesses, opportunities, and threats (SWOT) and discussions of the Facilities mission, vision, goals, and values. Volunteer Facilities staff served on a number of strategic planning committees to finalize development of the plan. Teams developed a draft mission statement, vision statement, Facilities goals, and core values that were ultimately approved by the Facilities leadership team.

Upon approval of the Facilities Strategic Plan framework, Facilities staff methodically reviewed each of the UTSA and VPBA Strategic Initiatives and Tactics, as well as existing Facilities goals, and established Facilities Strategic Goals aligned with the higher level strategic initiatives. These goals were coded to correspond with appropriate UTSA strategic initiatives and tactics and VPBA strategic plan goals. Action items were developed to support initiatives, tactics, and Business Affairs goals. Facilities summarized the completed Facilities Strategic Plan in a trifold pamphlet and provided copies to all Facilities employees.

In 2015, UTSA embarked on a strategic plan update, *Blueprint 2020*, which is now complete and has informed the Office of Facilities’ updated Facilities Strategic Plan. The plan uses an alignment process similar to that conducted with the previous institutional strategic plan, except that the new Facilities Strategic Plan will be developed using a balanced scorecard approach as recommended by the 2012 APPA FMEP report.

SPENDING TIME WITH CUSTOMERS AND FRONT-LINE STAFF

Facilities senior leadership has been effective in establishing communication by developing formal customer service guidelines and written communication/notification guidelines for emergency and nonemergency work. Facilities staff members facilitate several standing meetings whose primary purpose is to inform key customers and communicate the status of projects and other Facilities-related activities.

Facilities senior leadership promotes customer and stakeholder feedback by conducting monthly surveys of customer satisfaction on completed work orders and by surveying customers at the end of all institutional projects. Additionally, Facilities has developed a baseline customer satisfaction survey to measure satisfaction levels of faculty and staff stakeholders on general Facilities services.

Customer Services maintains a weekly log of customer concerns and meets individually with customers to assure that their concerns are resolved satisfactorily. Facilities has established an automated electronic work request process, held town halls, and developed a formal training program to communicate specifics of the work-request process to customers.

Facilities senior leadership reinforce the role of front-line staff by providing training in Facilities Customer Service guidelines and formal training in Business Affairs’ purpose and guiding principles.

Facilities has also collaborated with the Human Resources (HR) Department to establish a formal supervisory curriculum that all Facilities supervisors are required to complete to ensure they have the tools to grow and lead successfully at the University. In an effort to enhance customer service skills for key staff engaged with customers, Facilities has trained 60 employees in the highly regarded Dale Carnegie Customer Focused training program.

SHARED VALUES


Senior Business Affairs leadership, including the AVP for

Facilities, have established a culture of excellence by developing the brand “Business Affairs—Your Partner for Successful Solutions” and a brand promise: “We are committed to helping you achieve your goals through excellence in service—every person, every day, every job.” To achieve and sustain cultural excellence, the Business Affairs organization and UTSA Facilities established a purpose, “We Make Success Happen!” and a set of Guiding Principles with mandatory training for all staff. The guiding principles are:

- We respect and care for each other
- We partner to deliver excellent service
- We value and empower people
- We create positive change
- We do the right thing

During job interviews, candidates for Business Affairs and Facilities positions respond to questions related to the above guiding principles. UTSA Facilities provides monthly and quarterly employee awards to outstanding individuals and teams as part of its “Celebrating Facilities Excellence” and “Estrella” (“Star”) programs.

Facilities Leadership encourages and provides funding for employees to obtain and maintain professional and trade credentials and for staff to attend regional and national trade conferences, technical training, and HR-sponsored training programs. With a large number of Spanish-only speaking employees, particularly in housekeeping and grounds areas, Facilities has provided English-Spanish computer training, and Rosetta Stone language learning in both English and Spanish. Facilities employees also complete annual compliance and Conflict of Interest training, which reviews institutional policies and procedures. This

is also true of customer service training, supervisory training, discrimination/sexual harassment training, and other mandatory training programs. 

The criteria and application form for the Award for Excellence in Facilities Management can be found at www.appa.org/membershipawards/index.cfm.

Deadline for 2017 AFE Award applications: November 30, 2016!



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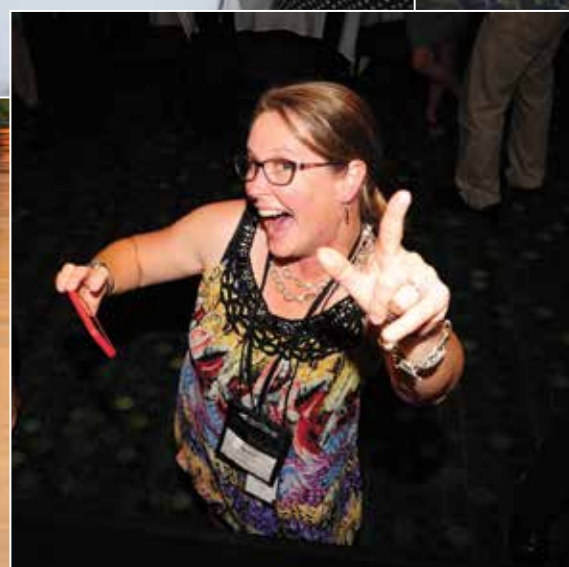
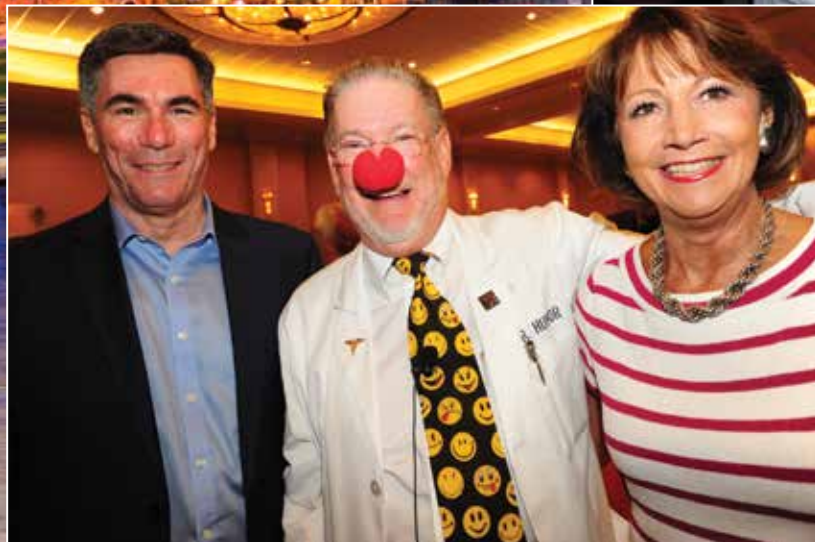
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Photos by Rhonda Hole



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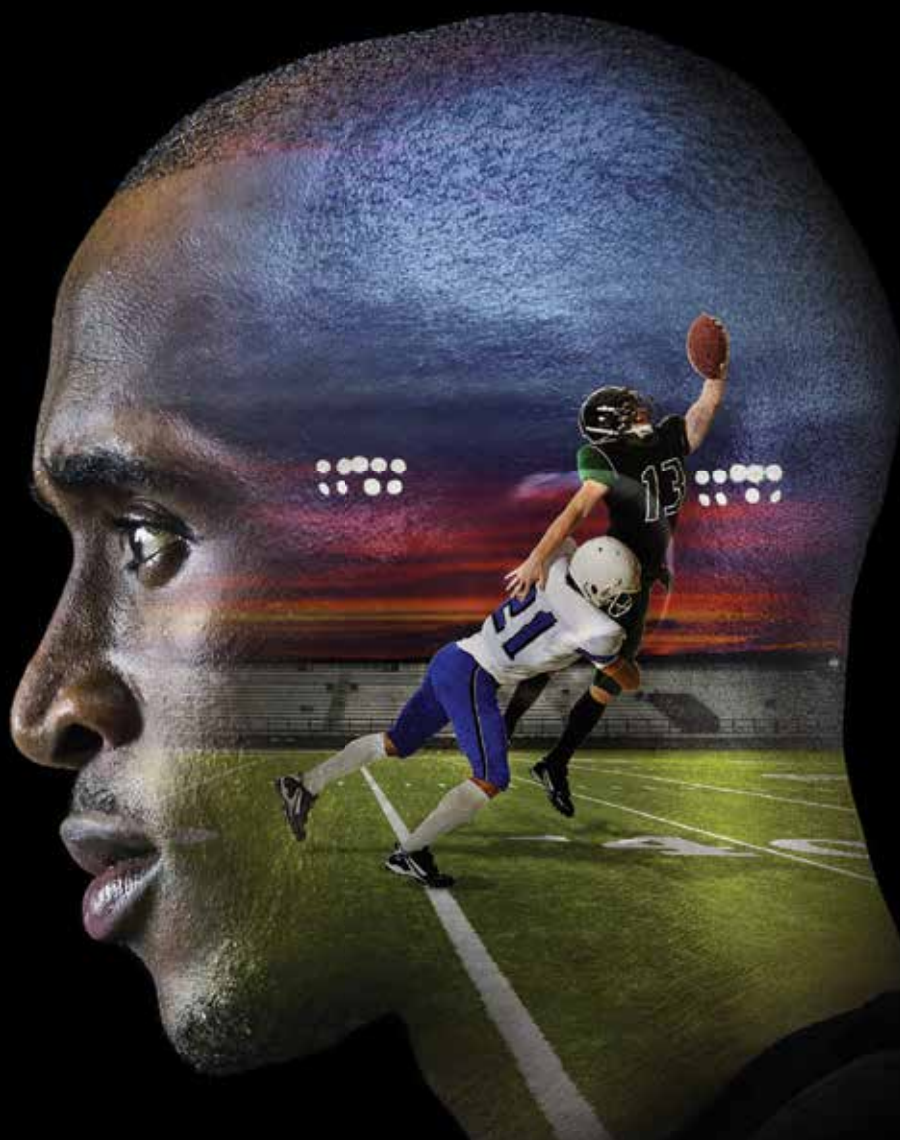
Daniel Wooten, *Tennessee State University*
John Ferris, *San Diego State University*
Dana Gillon, *University of Illinois at Urbana-Champaign*

APPA Staff

Left to right: Karen Aguilar, Suzanne Healy, Kristin Witters, Direna Cousins, John Bernhards, Lander Medlin, Corey Newman, Christina Hills, Holly Judd, Kelly Ostergrant.



(Continued on page 44)



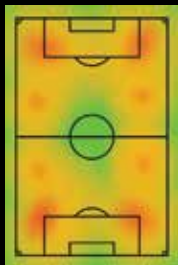
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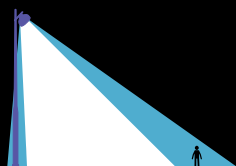
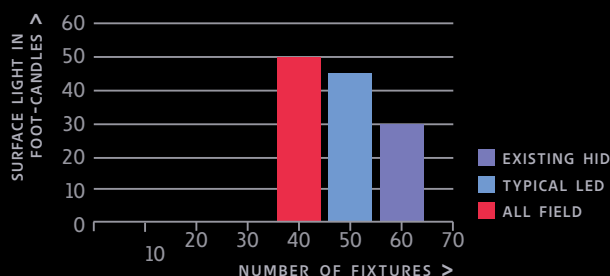


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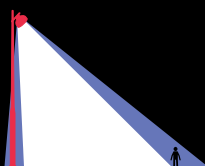
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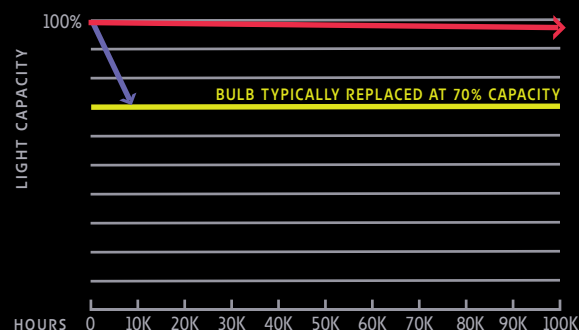


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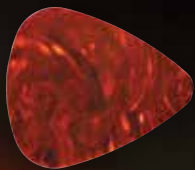


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Thank you for another great year!



Development of International Standards for Facility Management

By Theodore J. Weidner, Ph.D., P.E., CEFM, AIA

Representatives of APPA's Standards and Codes Council (ASCC) have been working with representatives from the International Facility Management Association (IFMA) through the American National Standards Institute (ANSI) and meeting with representatives from more than 20 countries, developing a set of international standards for facility management (FM). These standards are being developed under the International Organization for Standardization (ISO) technical committee, known as "TC 267 Facility Management." TC 267's standardization work began over three years ago, and the committee has met several times each year. While progress is sometimes slow, the standards are taking shape and may begin to affect educational facility leaders in the coming years.

Several European and Asian nations have FM standards affecting owners and organizations within their national boundaries; however, there are no international standards and no national standard for FM in the United States. We are catching up now. The ASCC understands the importance of FM standards and has been actively involved in the development to ensure that APPA's members are represented.

WHY

Why are FM standards important and why should APPA be involved? Educational facilities represent one of the largest building owners in the United States. Educational facilities also have some of the most varied building uses, including classrooms, laboratories, animal facilities, healthcare facilities, and residences. In short, APPA members represent a significant footprint in the built environment and should have a corresponding influence on any facility standards. *Perhaps even more important*, as a membership organization of 15,000 educational facilities professionals, APPA's best practices and

extensive body of knowledge provide a wealth of contributions for the purpose of creating national and international standards.

There is a hierarchy of requirements within every field that affects its ability and flexibility to operate. Codes are the most stringent of these requirements, and when recognized by a governmental body, become law. Typical examples of codes affecting our facilities are the fire safety codes as promulgated by the National Fire Protection Association (NFPA), building codes by the International Code Council (ICC), and rulings and codes established by the U.S. Occupational Safety and Health Administration (OSHA) regarding worker safety. At the bottom of the scale are guidelines, which are developed to assist with operational decisions but are not a legal requirement.

APPA's own custodial staffing guidelines are a good example. While contributors to the APPA guidelines would like to see them utilized by every educational organization, it is not mandatory. In the middle ground are standards, which may build on guidelines but don't have the requirements associated with codes unless a regulating body chooses to adopt them for that purpose.

In general, standards are voluntary and may be accepted and utilized by an organization to demonstrate a level of quality or value. The ISO 9000 quality improvement standards are a good example; an organization may be certified to comply with ISO 9000, but there is no legal obligation to be certified. From a marketing perspective, it may help an organization to be certified through ISO 9000, but it is not required by law.

CODE CHALLENGES

The challenge with codes is that they often come with cost implications for an organization. For instance, it is cheaper (first cost) to construct a

building without fire sprinklers; but if a community has accepted the ICC without modifications, then an owner may be required to install fire sprinklers to obtain a building permit or to continue to operate a facility. Often, a standards development organization (SDO) such as the NFPA must demonstrate the costs associated with a code change against the benefits resulting from the code. Governments may review the cost/benefit documents when deciding whether to adopt updates or changes to a code. Previous Code Talkers articles have provided comprehensive descriptions of the process followed by different SDOs with which the ASCC complies.

The FM standards work within ISO has focused on three areas to date. The first is clarifying what is meant by “facility management” and defining several terms that describe what the profession does. The definitions are high level, and focus on the profession overall rather than on specific definitions about what is in a facility or defining the services performed by a facility organization. ASCC is developing a separate effort to define those things that comprise facilities.

The *Facility Management—Terms and Definitions* document, ISO 41011, provides standard nomenclature used in FM and will be used in subsequent standards (described below). These definitions concern eight areas: FM, assets, people, sourcing, process, finance, general business, and measurement. Without going into the details of each area or the definitions provided, the terms and definition standard identifies that FM is a complex field incorporating a wide range of knowledge and expertise.


Beyond the complexity and scope of FM, there are also a number of ways of delivering or receiving FM services. As facility operators, we can view this in the form of a matrix: From an ownership perspective, FM services may be self-operating or outsourced; while from an FM perspective, the services may come from an internal service provider or from an outside organization (contractor). All four perspectives and both sides of the issue must be covered via these two approaches. It’s no wonder that it took over two years to reach agreement on the Terms and Definitions document.

TERMS AND DEFINITIONS

There are many terms in ISO 41011 whose definitions may be familiar to APPA members: terms such as “contracting,” “support service,” “end-user,” “zero-based budget,” and “benchmarking” to name a few. However, while we think we are familiar with a term and know a definition, there may be subtle but

important differences between what is presumed to be a common term and how ISO defines the term. APPA members will be generally comfortable with the definitions because they are consistent with the *Body of Knowledge* and other APPA publications.

The next standard is *Facility Management—Guidance on Strategic Sourcing and the Development of Agreements*, ISO 41012, developed concurrently with the Terms and Definitions document. This standard provides a management model for owners of facilities and their FM organizations to assess and determine if certain FM services should be retained or replaced. This is becoming—and will continue to be—an increasingly important issue.



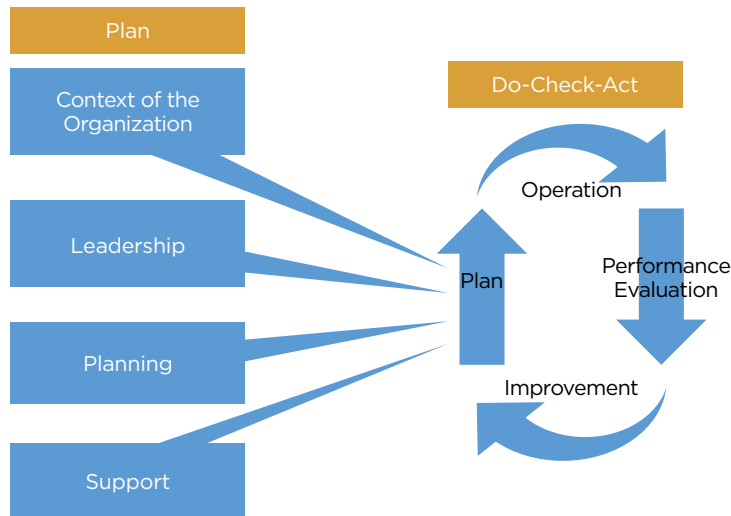
“In general, standards are voluntary and may be accepted and utilized by an organization to demonstrate a level of quality or value.”

Consider, for example, the rapid changes occurring in facilities technology and the rise of data-driven management practices, leading to more complex and specialized FM requirements that may require external support. Alternatively, an institution may decide to focus on its core mission and obtain all campus housing, for those who want it, from an outside provider. From the perspective of users, the standard supports the FM organization/owner in establishing expectations, defining what services will be delivered, overseeing the management of services, and measuring performance.

The above standards are almost ready for publication and were needed for the next, significant standard, *Management Systems*, ISO 41013. The *Management Systems* standard is in draft form now. It looks at an organization’s structure and shows how it can focus on continuous improvement via a Plan-Do-Check-Act (PDCA) cycle. APPA representatives on the committee have been heavily involved in developing this standard, taking advantage of systems that APPA pioneered for FM in 1989 and which it has used to identify campuses for the Award for Excellence and the Facilities Management Evaluation Program (FMEP).

Rather than outline the FMEP, which is described on the APPA website at www.appa.org/fmep, it may

Figure 1: PDCA Cycle



be more relevant to tie the goals of the *Management Systems* standard to the significant work being accomplished via the Thought Leaders Series (TLS) and recently discussed by Lander Medlin (July/August 2016, “A Preview of the 2016 Thought Leaders Report: *Remaking the Facilities Organization*”). There she previewed the work of the 2016 Thought Leaders symposium, during which participants discussed two major topics: “Creating the Customer-Centric Facilities Organization” and “Creating a New Facilities Team/Workforce.” This is exactly the goal of the *Management Systems* standard: helping an FM organization develop the tools needed to address customer needs and to improve effective delivery of FM services through a coordinated work team that changes as demands change.

THE PDCA CYCLE

The ISO 41013 drafting committee was subdivided into two parts: The first part looked at the four sections of the standard focusing on development of the Plan step; the second looked at three sections addressing the Do-Check-Act steps. Comprising the Plan section are the following: Context of the Organization, Leadership, Planning, and Support. These are further described below.

CONTEXT OF THE ORGANIZATION

Who is the customer? What are the customer’s strategic objectives? What services are needed? And how will the system be organized? In simple terms, these can be described as addressing the needs of the programs inside the buildings and not the buildings’

needs (materials, components, and systems). These fundamental questions are asked in the FMEP in several places. The TLS preview identified this section as “the organization knows who their customers are, what they need/want.” However, within the ISO standard, it gets a little more complex, just like running an educational FM organization. FM customers are both internal and external; they comprise both human and nonhuman (plants and animals) products and services. The organization being served also has goals and objectives that must be understood, legal and regulatory requirements that must be met, and risks that must be managed in some manner. Because the FM organization affects everyone (and everything) working in a facility, it is essential to understand all these elements to develop a meaningful management structure.

LEADERSHIP

This section looks at the leadership of the organization being served as well as the leadership providing the FM services (whether internal or external). Since leadership is more about creating an atmosphere where the entire team can work effectively, this is also the section that looks at policies, roles, and responsibilities. Similar questions are asked in the FMEP and addressed in the TLS report.

PLANNING

This section is not about architectural or master planning; it is about planning for normal operations and responding to the unexpected—in other words, how the FM organization will meet the larger organization’s goals and objectives as well as identify and respond to risks and other external influences. Being a standard, it provides no answers or mandates about how to do these things; rather it identifies what to consider and include in an operating plan. The plan also sets up requirements for the next section, by identifying what is required to address the needs of the organization being served.


SUPPORT

While it would be nice to have an outside organization dictate that the FM organization must have a specified level of resources to meet its responsibilities, such a standard would fail and not be adopted. Instead, this section outlines the factors that must be considered to provide the required services. Those factors include people, funding, equipment/tools, training, communication (both internal and external to FM), and metrics (where available).

These four sections of the *Management Systems* standard set up the remaining three sections, which show how to use the Plan step effectively to manage an organization. These three sections follow the three steps in a PDCA cycle of continuous improvement: Do, Check, and Act. They include the following: measuring what occurs and coordinating the operation with customer needs and goals; monitoring the operation and measuring against goals and performance indicators; then addressing nonconformity or opportunities for improvement. These all comprise, in an organized way, an international standard for FM organizations.

At this point the ISO *Management Systems* standard is in the committee draft stage. It will be available for all members of the ISO FM Task Committee. These experts, owners, operators, consultants, and others from around the world will review the draft and comment. In October 2016, there will be a meeting to collect comments and make revisions before finalizing the draft for international distribution and comment. The goal is to have the standard published early next year.

APPA has been well represented with three active participants—Brooks Baker, John Bernhards, and Ted Weidner—utilizing existing APPA tools and documents that have long-term validation in practice by APPA members. We welcome any comments about the standard's contents as described in this article. As the standards are made available through ISO, there will be additional information and presentations so APPA members can better understand their scope and implications for facility maintenance.

Just as with ISO 9000, an organization may or may not choose to utilize them and, when they are available, to be certified. Will an internal FM organization wish to get ISO certified? Maybe. Will a campus that outsources FM services want to see service providers become ISO certified? It's likely. Just as ISO 9000 has "set the bar" for overall quality, ISO 41001 has the potential to set the bar for FM. 

Ted Weidner is associate professor at Purdue University in West Lafayette, IN, and a member of the APPA Standards and Code Council (ASCC). He can be reached at ted@weidnerfac.com.



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Find the Hidden Space on Your High-Density Campus

By Laura Vassilowitch

We all know what high density feels like: no open tables in the dining hall, bumping into a student as you round the corner heading to class, or sharing an office with another faculty member that barely fits your own furniture and reference materials.

Other than the occasional meal “to go” due to lack of available seating, what is the effect of a high campus density? At the simplest and most sharply evident level, a high-density campus experiences more wear and tear on the facilities, shortening life cycles, and an increased demand for capital resources to maintain and upgrade the more rapidly degenerating spaces.

THE HIGH-DENSITY SWORD

Thus appears the first edge of the high-density sword: The carpeting that should have lasted seven years lasts only five; the desks that get rearranged for 10 classes a day instead of six lose their “feet,” and therefore their stability, faster. With the shortened life cycles of multiple components, the need for more frequent and more extensive renovations plagues the dense campus. However, once the resources are available for these renovations, the second side of the high-density sword makes an appearance: Where do we put these programs while renovating?

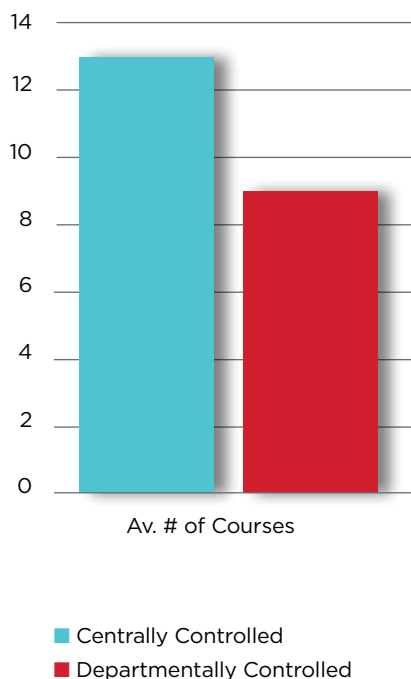
A DOUBLE-EDGED SWORD

Unlike the campuses on the low end of the spectrum, a high-density campus often cannot identify the swing space needed to relocate programs during renovations. But it is there. Every campus, no matter how dense, has some underutilized square footage. Let’s examine three approaches to identifying underutilized academic space, to help dull the double-edged sword of renovating a high-density campus.

1. Take back the space—For some programs, it makes sense to have a single department control the room schedule. After all, who wants to teach a music theory class in a biology lab? Recent assessments found that departmentally “owned” general purpose rooms, such as classrooms, lecture halls, and seminar rooms, hold fewer courses per semester than centrally controlled general purpose spaces on campus (see Figure 1).

Passing the scheduling reins for these spaces from the departments to the central scheduling office will allow multiple course subjects to utilize this square footage. Assuming that the average departmentally controlled space holds 60 to 75 percent of the

Figure 1: Average # of Courses Per Semester/room



course load of centrally controlled rooms, centralized scheduling of these spaces will release 25 to 40 percent of the square footage of these spaces for “swing space.” With an average campus’s general purpose teaching space inventory comprised of 30 percent departmentally controlled spaces, there are often significant opportunities to improve the utilization rates of these spaces and “find” the swing space needed for modest to major renovations.

2. Rightsize the rooms—If you are lucky enough to have had your academic space constructed entirely in the last five years, feel free to skip this section. But if you are like the majority of institutions, the teaching spaces on your campus were designed 15, 20, or even 30-plus years ago and are no longer ideal for modern teaching pedagogy and class sizes.

Many campuses are pushing to decrease the average course size and therefore improve the professor-student ratio without assessing how well their teaching spaces are designed to handle this shift. Whatever your faculty-student ratio may be, it has no doubt changed from 20 years ago, while the capacity of available teaching spaces has stayed fairly constant.

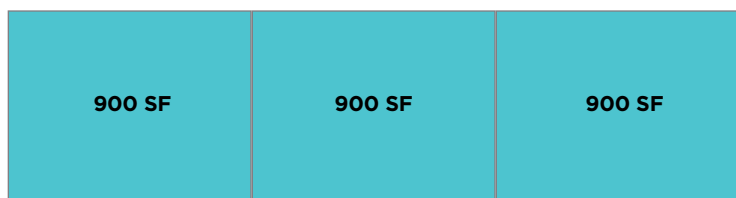
Understanding the distribution of room capacities compared with the distribution of course sizes will likely reveal that the number of small course enrollments is proportionately larger than the ratio of correct-sized rooms to hold them, as the historic trend has been to decrease course sizes. This translates into rooms that are larger than needed; empty seats and unutilized space.

Suppose that three adjoining 45-person classrooms (approximately 900 square feet each) are each holding a maximum course size of 25 students. Reconfiguring these spaces during an interim session to form three spaces, each of which holds 25 students (approximately 500 square feet each), can maintain scheduling the same course load and release 1,200 square feet of space (see Figure 2).

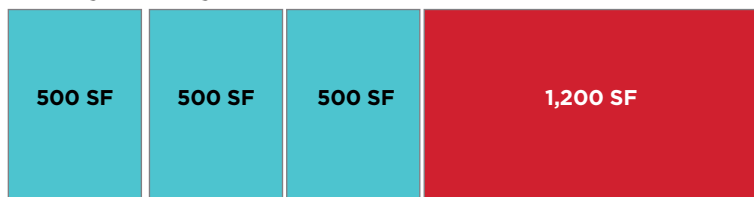
3. Reassess the course schedule—Few self-respecting seniors would willingly sign up for an 8 a.m. class, let alone

Figure 2: Reconfigured Space

Original Design



Reconfigured Design



■ Scheduled Space ■ “Released” Space

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one that meets on Fridays. In fact, many faculty members are equally unhappy about early-morning or late-afternoon courses. Typical institutions see room utilization rates before 9 a.m. and after 1 p.m. drop drastically from the midday peak periods.

This uneven distribution of scheduled courses throughout the day requires a larger inventory of teaching spaces to accommodate the volume of courses taught during the peak hours. By redistributing the same course schedule throughout the seven-hour period, a 60 percent utilization rate can be achieved. In fact, with this redistribution, the inventory of teaching spaces could be reduced by 20 percent and still support the same quantity of courses. Even minor reallocations of courses outside of current peak hours can result in the release of significant square footage.

A THIRD EDGE TO THE SWORD

Identifying underutilized square footage on a high-density campus is by no means an easy task, and the process of capturing that space requires cooperation and trust from the campus

community (which is a proportionately larger community than that of a same-size, less-dense campus—a third edge to the sword, perhaps?).

The reality of a high-density campus is that any space not utilized to full potential will be taken over by someone or something. The three approaches outlined in this article will help identify the underutilized areas to ensure that the improved utilization of these spaces benefits not just a single individual or department, but has larger, campus-wide effects. 

Laura Vassilowitch is associate director of product management at Sightlines, a Gordian company based in Guilford, CT. She can be reached at lvassilowitch@sightlinesllc.com. This is her first article for *Facilities Manager*.

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Five Ways Educational Facilities Managers Can Use Predictive Maintenance

By Saar Yoskovitz

Prediction usually gets a bad rap. From weather to sports, the moments that stand out are the ones fortune tellers get wrong. But the old saying that “prediction is very hard, especially when it’s about the future,” fails to take into account modern technological advances.

Phones and cars aren’t the only things that technology has improved. Predictive maintenance methods have come a long way as well, branching out from their original uses to help ensure safer, more streamlined workplaces. Utilizing these advances will help make educational facilities more efficient now and in the future, when these technologies will be more common in general.

WHAT IS PREDICTIVE MAINTENANCE?

Changing oil on a schedule and trying to make sure belts don’t snap by occasionally checking for cracks counts as preventive maintenance. Predictive maintenance (PdM), however, relies less on guesswork and more on measured data. PdM uses sensors and other methods to track real-time machine conditions to inform maintenance crews of the first signs of potential breakdowns.

Many educational facilities operate on critical steam-driven equipment to maintain regulatory temperatures in classrooms and dormitories. Additionally, for universities with research facilities requiring narrow ambient temperature ranges, especially facili-



ties related to biomedical research, HVAC failure can ruin months' if not years' worth of vital research. PdM offers facility managers and technicians an operating edge. Instead of running machines to failure, techs scan them for weaknesses, correct problems before they grow, and save money at the same time. Here are five ways that PdM has become accessible to educational facilities teams today:

1. **Oil Analysis (OA).** One of the tried-and-true methods of PdM, OA was developed just after World War II. Lab analysis of machine oil provides information technicians might not otherwise have. Debris and contaminants give insight into the state of pumps, bearings, and gearboxes, and can also help determine more cost-effective oil change intervals. Whichever lab you choose, be sure it is ISO certified and that it tests to standards set by the American Society for Testing and Materials (ASTM).
2. **Thermal Imaging.** While newer than oil analysis, thermal imaging has become increasingly affordable. From faulty insulation to overheating electric motors, thermal imaging cameras show otherwise unseen holes and hotspots that can lead to catastrophic failures and injuries. No other technology provides such accurate visuals of the wear and tear that leads to the need for service and replacement.
3. **Vibration Analysis (VA).** Developed in the 1950s for high-end equipment, VA has benefited the most from computer and Internet technologies.

Until recently, the equipment and extensive training that VA required made it cost prohibitive for most. Now, contractors can utilize sensors that transmit data off-site for analysis instead of having to analyze it themselves. Servers send real-time alerts at the first sign of trouble and technicians can access them right on their mobile device. The newest benefit is machine learning—the software continually improves itself by comparing new data to past trends. The more data it gets, the better it gets at identifying trouble before it happens.

4. **Custom Maintenance Schedules.** Planned downtime is a critical operational decision. Using PdM, technicians and facilities personnel can help customers develop maintenance schedules based on their machine's actual condition and not just scheduled checkups that can miss critical moments between visits. Anything that lowers risks and helps take the guesswork out of maintaining equipment is a good thing.
5. **Bettering the Bottom Line.** PdM requires an initial expenditure for customers, who will need to invest a bit in education. The savings quickly add up. Costs related to downtime and regularly scheduled maintenance should drop significantly, and because these are loss-control technologies, insurance costs can also be reduced. As PdM technology grows, more facilities teams can offer both the strategy and the skill base for these new technologies to flourish and help streamline performance responsibilities.

NEW METHODS, NEW MARGINS

Today's PdM may sound a bit like old-school methods, but it is better, cheaper, and faster than anything previously available. The improvements in vibration analysis alone are amazing—it began with a \$20,000 specialized tablet and a certified engineer with 10 years of experience who took days to generate an analysis. Today, the same analysis can be done in minutes on a mobile device. As PdM becomes more and more accessible, educational facilities managers who change with the times will leave their preventive maintenance competitors behind. ☛

Saar Yoskovitz is CEO and cofounder of Augury, Inc., based in New York, NY, and can be reached at saar@augury.com. This is his first article for *Facilities Manager*.

Key Facilities Metrics: The Value of Measuring Consumption

By Sally Grans Korsh

Most APPA members appreciate the value of measuring consumption. The old adage “If you can’t measure it, you can’t manage it” is understood by sophisticated campus facilities teams. However, getting staff to spend the time—and sometimes the cost—to capture this critical data is not easy in the face of the increasing financial pressures and ongoing staff constraints of daily campus operations.

Members of the National Association of College and University Business Officers (NACUBO) Sustainability Advisory Panel (SAP) are keenly aware that many campus leaders do not have awareness of key facilities measures. They know full-time equivalent (FTE) ratios, the cost of tuition, and estimated faculty expenses, but rarely recognize basic building-related facts. SAP members noted it was imperative that to plan or improve a campus, leaders need to have a basic understanding of these campus consumption metrics. As a result, NACUBO joined with APPA two years ago to create the Key Facilities Metrics (KFM) Survey; a collection of basic data in five important consumption areas: British thermal units (BTUs), electrical, water, waste, and carbon. Given the many surveys a campus can participate in, SAP members were committed to making the KFM Survey as simple as possible, with data easily retrieved from vendors or utility bills.

APPA was a natural partner in this effort, as the association has already implemented the more sophisticated Facilities Performance Indicators (FPI) survey. FPI is a robust survey that benchmarks facilities inventory, ownership costs, operations, management budget, customer satisfaction, and staffing components. It is considered the gold standard for metrics by facilities personnel and helps financial officers understand physical plant needs.

HOW IT WORKS

One primary feature of the Key Facilities Metrics (KFM) Survey is to allow campus staff to complete it

with a relatively low time commitment and to create metrics that campus administrators can easily grasp. This means asking only a handful of questions that can be answered by reviewing vendor invoices from the previous year. Additionally, it means adjusting survey results so they are more relevant, for example, stating BTU consumption as “85 kBTU/square foot” instead of “8,500 BTU/square foot.”

You can consider the KFM a “gateway survey” to the more sophisticated FPI survey or the more labor-intensive surveys that include academic offerings, such as the AASHE STARS (Sustainability Tracking, Assessment & Rating System) framework. KFM allows campuses that have not participated in more extensive surveys to start using building metrics to inform campus leaders. Conversely, campuses that have participated in the more extensive surveys are encour-

“In the past, these metrics were used primarily by technical staff in the facilities department; participating in the Key Facilities Metrics survey increased awareness and understanding of these issues among our business office.”

Amir Mohammadi, EdD, Vice President of Finance, Administrative Affairs and Advancement Services, Slippery Rock University

aged to answer these simpler KFM survey questions, because their contribution helps significantly to achieve better-aggregated, institutional-type ratios.

After a campus representative has completed the KFM Survey and the results are confirmed by APPA staff, the data will be uploaded to the APPA website. The data can be retrieved in a number of ways. A campus can choose to compare within regions or by institutional type, gross square footage (GSF), student FTE ratios, or a combination of all of these. This is an important factor, because campuses differ in what metrics resonate with leaders. For example, regarding energy use, a campus might have a high GSF ratio due to a large student population and

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“It was good to do both surveys [Facilities Performance Indicators and Key Facilities Metrics] at the same time. Will definitely do them again.”

*Sharon Curry, Coordinator for Sustainability and Support Services,
Trinity University*

being open long hours on multiple days. That campus would be higher in GSF consumption, but would have far less energy use per FTE. It is acceptable—and even encouraged—to use more energy per GSF as long as it helps more students learn!

GETTING THE WORD OUT

Using these metrics can be a great starting point for planning and advancing the reduction of energy, water, and waste. Sharing this information with leaders, students, and staff can be beneficial for planning

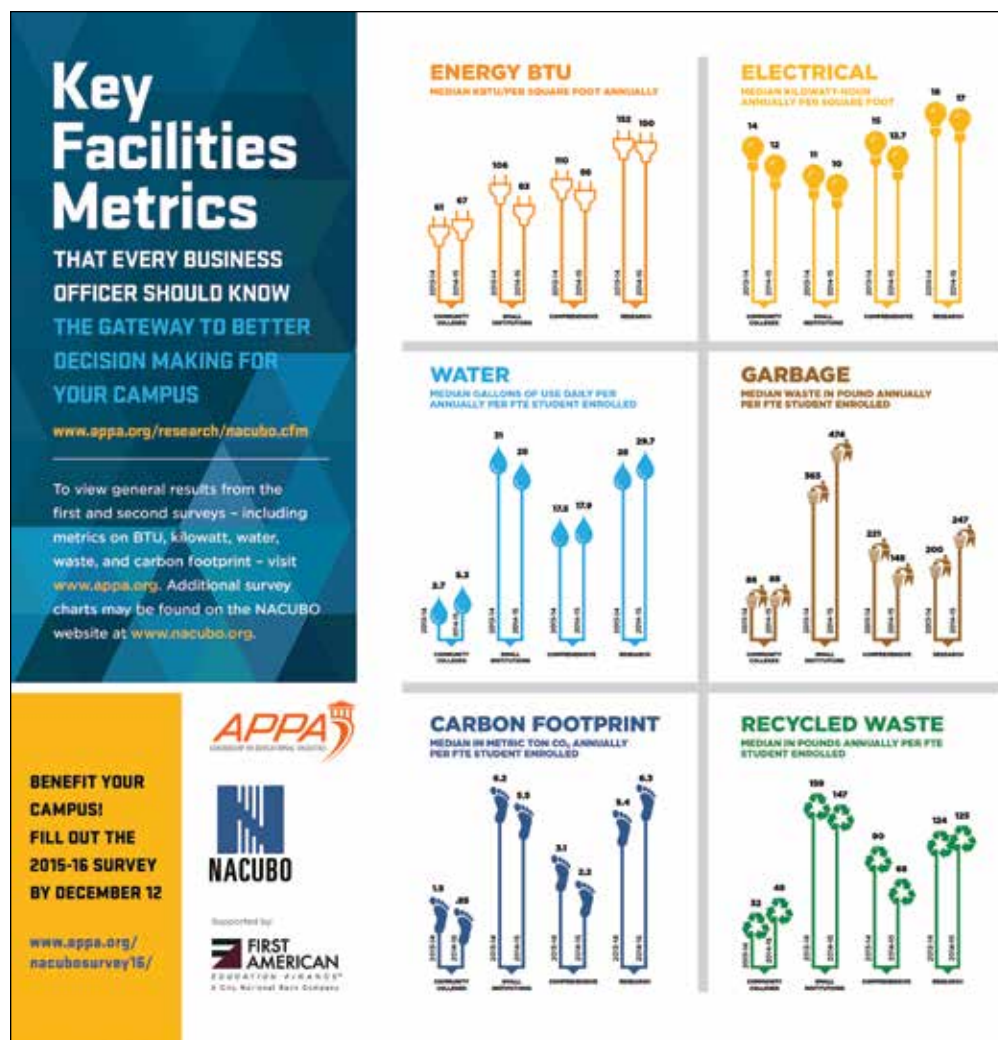
and adjusting behavior that may reduce consumption. Whether a campus is small or large, there are some great examples available of using data to reduce energy, save costs, and improve the environment. Here are a few:

- One community college in the Midwest noticed that it was comparatively higher than other campuses in its region for energy consumption, despite a recent update to its digital control system. A consultant evaluated the 300,000-square-foot campus and found a computer glitch in the programming that allowed all of the toilet fans to run 24 hours a day, seven days a week, 365 days a year. By correcting this digital error, the campus saved \$18,000 annually in unnecessary heating, cooling, and ventilation costs.
- A large university used its metrics on utility consumption to develop a total conservation plan that resulted in \$14.5 million reduced utility costs.

Informing all leaders of these key facilities metrics—including provosts and deans—is another means to reduce consumption. One community technical college found that its water usage was 10 gallons per FTE annually, significantly higher than at other campuses. The chief financial officer brought this fact to the faculty whose programs were likely the culprit of using the most water: the horticulture, culinary, and fire suppression programs. After just one year of adding in minimal conservation efforts suggested by the faculty, the institution reduced water usage to less than 8.5 gallons per FTE. That 15 percent savings assisted campus finances, taught students sound conservation measures for the future, and helped to conserve the community’s limited water resources.

Another example of using data directly relates to students. For waste, garbage and recycle ratios are measured in pounds per year per FTE (highlighted in the graphic). The amount of garbage students produce varies

Key Facilities Metrics



by campus type, from 88 pounds per year to 247 pounds per year, with recycling averaging from 48 pounds per year to 124 pounds per year. If students know these facts, it might impact their behavior and encourage more of them to recycle. Or from an operational perspective, these facts might inform pounds-per-year analyses and persuade leadership to procure additional recycle bins and place them more strategically throughout the campus.

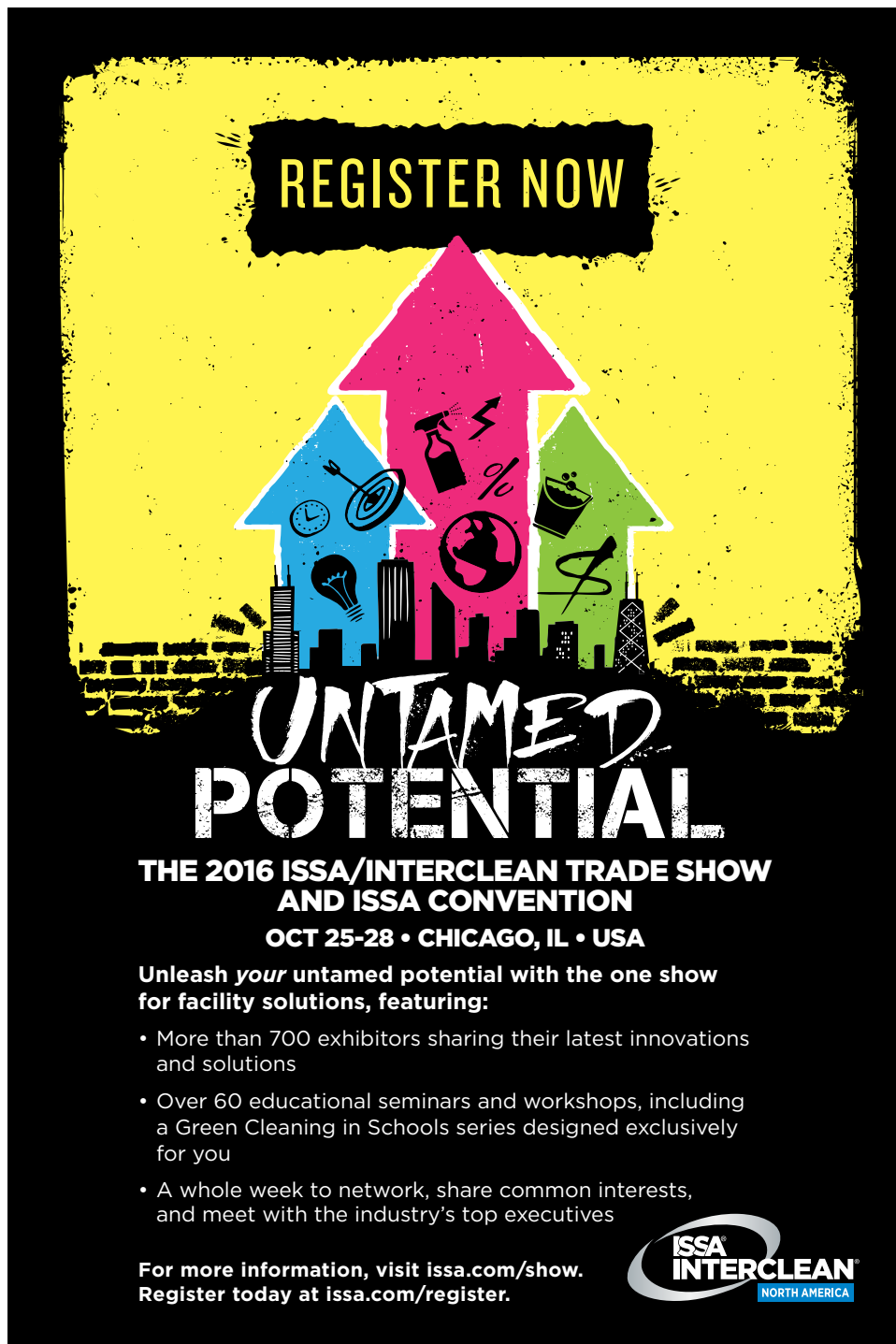
THE EASY WAY TO QUANTIFY CONSUMPTION

The KFM Survey is flexible, so that a campus can enter two, three, or all five metrics. Some campuses may not be able to enter all of the metrics; for example, one small rural college did not have its garbage picked up in pounds, so it could not complete the waste/recycle component. However, the leadership started to self-assess their consumption and discovered that their garbage was being picked up frequently, but with dumpsters only partially filled. Analyzing the situation, they reduced the amount of pickup days, which resulted in full garbage containers being picked up. While this tactic didn't necessarily reduce overall consumption, it did lower campus costs and added environmental benefits for the community due to less truck travel. Having the data and reviewing it in the analysis and planning process can benefit campus operations.

Whether working in facilities, finance, or the academic units of a campus, all leaders should be aware of the basic consumption costs of the physical plant. Operations are typically the second highest cost for an institution after salaries. The basic metrics captured by the KFM Survey are a start for all campuses to easily and efficiently quantify consumption. Encourage your campus to participate in the survey, which is open now and will close on December 12, 2016. This requires review of invoices for the 2015-16 academic year. The responsibility might be that of the finance/business office or the facilities

unit. Each campus is different, but participation in the survey is urged. 

Sally Grans Korsh is director of facilities management and environmental policy at the National Association of College and University Business Officers (NACUBO), Washington, DC. She can be reached at sgranskorsh@nacubo.org. This is her first article for *Facilities Manager*.



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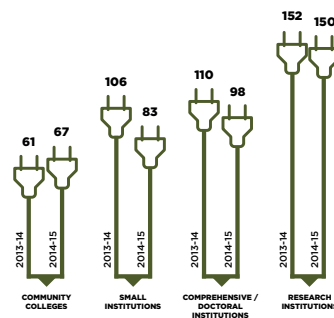
NACUBO provides leadership for both financial and environmental impact—a combination that complements collaboration with the facilities team to advance higher education efficiency and effectiveness. Membership is institution based; if your campus is a member, you may join us to (1) follow developments of the Sustainability Community; (2) receive *Current*, NACUBO's biweekly news on higher education issues; and (3) review other resources to facilitate collaboration with your facilities team, such as:

On-demand videos and podcasts. Topics range from implementing whole building retrofits as a means to eliminate deferred maintenance and reduce energy cost, to finding out how green revolving funds improve energy and minimize operational staff costs.

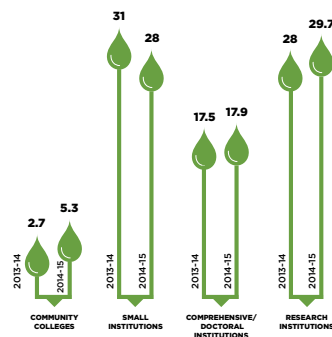
The Key Facilities Metrics survey, created jointly by APPA and NACUBO. Consider participating in this year's survey (with support from First American Education Finance), which captures five consumption elements that can improve planning from both the facilities and finance perspective: BTU, electrical, water, waste, and carbon. Survey deadline: Dec. 12, 2016 (www.appa.org/nacubosurvey16).

For more on these useful resources, visit
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ENERGY BTU MEDIAN KBTU/PER SQUARE FOOT



WATER MEDIAN GALLONS OF USE PER FTE STUDENT ENROLLED



National Association of College and
University Business Officers

Book Review Editor: Theodore J. Weidner, Ph.D., P.E., CFP, AIA

I've read several books this summer. I don't review them all, because I read for enjoyment, too. That means that not everything I read is technical or work-related.

Although most of what I read is nonfiction, I will occasionally divert my attention with a thriller or mystery. I've been reading a lot of history lately and it is fascinating stuff. I now find that history I thought was boring in my youth can be exciting in the hands of a good writer. Events from hundreds of years ago can come to life when the writer is good at his craft. Even if you don't read the books reviewed in this column, I hope you're able to immerse yourself in a good book, and get away from the frustrations of work and life.

MEANINGFUL: THE STORY OF IDEAS THAT FLY

Bernadette Jiwa, Perceptive Press, Australia, 2015, 176 pp., hardcover, softcover, and Kindle.

We're in a service industry. We measure our success, in part, by customer service ratings about the cleanliness of rooms, the completion of maintenance work requests, and the beauty of our campus. We also ask questions about how our employees interact with the larger campus and with individuals. But is this what our customers want? Do we really know? What have we done to test our perceptions of good customer service?

Bernadette Jiwa looks at several products or services that have been created over time in *Meaningful: The Story of Ideas that Fly*. Some of the products she examines were evolutionary, gradually changing in response to customer needs, while some were disruptive and provided an entirely new product or service. In some cases, the examples in *Meaningful* seem analogous to the concepts in *Who Moved My Cheese?* (Bookshelf, May/June 2000) but from a different perspective. Rather than helping you to merely react to changes, Jiwa provides a recipe for developing new ideas, creating disruption, building new markets for products or services your customers don't yet know they need, and generating new



opportunities for success.

Jiwa's recipe is relatively straightforward; she explains it with a figure-eight loop representing four phases of product development. You can enter the "eight" from the "customer" or "company" half of the loop at the "story," "insight," "product," or "experience" sections. Move through the loop and touch the other sections, then repeat. It's a great deal like the PDCA cycle (plan, do, check, act), but focused on product development and on finding new ways to meet customer desires.

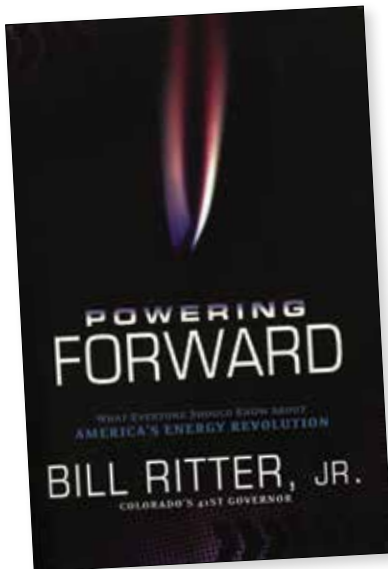
It's essential to understand this loop as a continuous process. Products or services that stop after a single circuit receive some benefits,

but they don't last. A great market or product last only as long as you are a unique provider or competition is limited. Successful providers are constantly checking the market and finding new disruptions.

Meaningful is an easy read. The examples are nicely documented and tied to the figure-eight cycle. While many facility officers don't view their organization as at risk to disruptions, I'd argue that it's only a matter of time. Rather than discover that time has come, it would be wise to read *Meaningful* and determine how to manage your own disruption and reinvention.

POWERING FORWARD: WHAT EVERYONE SHOULD KNOW ABOUT AMERICA'S ENERGY REVOLUTION

Bill Ritter Jr., Fulcrum Publishing, Golden, CO, 2016, 231 pp., softcover.



There are a lot of books, articles, essays, and opinions about the future of energy and how quickly the world must move in order to avoid—or temper—the drivers of climate change, such as excess carbon dioxide in the atmosphere. Thus the former governor of Colorado, Bill Ritter Jr., who had led the effort to make changes in his four-year term, has written *Powering Forward*.

Ritter founded and leads the Center for the New Energy Economy at Colorado State University, so this looks a great deal like the text for a course or two. But beyond the potential for this to be a college textbook (rather affordable compared to some I've seen), it

is also a nice reference for a campus sustainability officer or someone in need of convincing.

In a manner typical of an attorney, Ritter's first several chapters lay the groundwork for the need to deal with our energy thirst in a different way. He focuses on climate change issues as reflected in extreme weather conditions and shifts in the range of pests. Colorado is an excellent reflector of these changes, having been ravaged by devastating floods and pine bark beetles, to name two. There is plenty of recognition of things accomplished and attempted in the Colorado statehouse as well as things undone—in other words, a little more politicking than I'm comfortable with.

Regardless, the arguments are presented in a compelling manner. There are some good graphs and diagrams (generally drawn from standard references) that support those arguments and highlight trends. But there aren't too many, so the book is a little less technical than one might expect. Nevertheless, it is heavily footnoted with over 600 references.

Some unique suggestions are presented, many of which have been recommended by facility officers for years. It's a relatively positive, upbeat discussion about climate change and what needs to be done to prevent reaching the CO₂ tipping point. It is also balanced with clear recognition that throwing money at different solutions is not the best approach, and that there is no silver bullet to address the challenges of slaking our thirst for energy, predominately from fossil fuels. *Powering Forward* is not your typical climate change text, but it's worthy of your time. I'm happy to have it in my library. ☺

Ted Weidner is an associate professor at Purdue University, West Lafayette, IN, and consults on facilities management issues primarily for educational organizations. He can be reached at tjweidne@purdue.edu.

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first responders who have never set foot inside a building. For further information on RealView's Command-Scope visit www.realviewllc.com.

BRASS KNUCKLE, a provider of safety solutions, introduces the SmartCut BKCR3520, an ANSI Cut Level 3 glove. Designed to combine medium-level cut protection with excellent abrasion and slip resistance, the 3520 also delivers a high level of dexterity. Its slip-resistant, foam nitrile palm coating provides a secure grip, and its reinforced thumb crotch offers excellent abrasion resistance in the glove's most critical wear area—between the thumb and forefinger. This unique feature prevents heavy chafing that can eventually wear down the glove's coating, making it unsafe to wear. For appli-



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2016

APPA THOUGHT LEADERS SERIES

REMAKING THE FACILITIES ORGANIZATION

PART 1



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International Standard Book Number: 1-890956-94-5
Produced in the United States of America

Section I:

Executive Summary

Why remake the higher education facilities organization?

The theme of the 2016 APPA Thought Leaders symposium was “Remaking the Facilities Management Organization.” This immediately raises two questions: Why should the organization be remade? What should it look like at the end of its transformation?

The answer to the first question is rooted in the challenges facing all higher education institutions—challenges of rising costs and declining state support, of soaring student debt and sinking budgets. These challenges are well-known to all in higher education. Less understood is another challenge: **The culture in which many staff and administrators operate lacks focus.** Staff go about their jobs, with many performing their work well, but as a unit they are not striving together toward a single goal.

The result? Missed opportunities to **create exceptional experiences** for students, parents, faculty, and other customers of the institution. Missed opportunities to drive excellent delivery of service consistently and with disciplined execution.

An exceptional experience for higher education customers means that every time individuals step on campus or interact with a member of the staff, they are made to feel welcome, respected, treated with consideration, and leave believing they were heard and that their needs were given top priority. When customers have these sorts of experiences, their sense of appreciation and loyalty soars, thereby, becoming advocates for the institution—devoted alumni, dedicated community promoters, and enthusiastic donors.

To answer the second question, the remade facilities

management organization should possess a **culture dedicated to the mission of the institution and committed to creating exceptional customer experiences, driven to effectively deliver excellence consistently over time.**

The culture is critical. Customer loyalty doesn’t develop by accident. It is the deliberate result of a strong organizational culture. Facilities organizations can build on this culture to craft policies and implement systems that enhance the customer experience through effective delivery systems. At the same time, they can reap the benefits of engaged employees and streamlined processes.

Moving toward an engaged, committed facilities organizational culture

This report, which draws on the discussions of higher education leaders at the Thought Leaders symposium as well as the views of industry experts in customer service, begins by **examining the characteristics of the best—and the worst—customer service organizations.** The first section of the report pulls back the curtain to examine the inner operations of organizations that routinely produce exceptional customer experiences. By the section’s conclusion, we come to understand the essential traits of excellent customer service organizations: a culture and leadership that prioritize the customer experience, policies and processes that promote customer service, and employees who demonstrate commitment and a passion for excellence.

The report continues by making the case for a customer-centric higher education facilities organization. Experts provide their insights on how a focus on the customer provides a framework for driving change. The benefits of a customer-centric focus detailed in this section include **empowered employees, better alignment between the mission of the facilities organization and**

the mission of the institution, and improved stewardship of campus systems and resources.

The final substantive section of the report examines in detail how a customer-centric focus can be applied to the **four major responsibilities of educational facilities organizations**: 1) general administration and management; 2) operations and maintenance; 3) energy and utilities; and 4) facilities planning, design, and construction. This section defines goals within each of

these areas and suggests strategies for facilities leaders to achieve these goals.

Throughout the report, we have included “Questions for Reflection,” which provide opportunities for you to pause and consider how the information in this report applies to your organization. We encourage you to use these questions as points of departure where you can engage others in your institution in thoughtful debate about **the value of the customer experience in your organization and how that experience could be improved.**

Section 2:

Introduction

I called a computer printer company's customer service about my new printer that wouldn't interface with my computer, even though the company swore it would easily work. After hours of being on hold and being told that I had obviously done something wrong or just couldn't understand, the rep told me, "Yeah, really not my problem, lady."

– Quoted from Kate Nasser, "The 25 Worst Customer Service Stories to Train the Best CSRs," *The Smart SenseAbilities Blog*, www.KateNasser.com.

There's something irresistible about a **terrible customer experience**. We have all endured inferior service at some point in our lives, and we immediately identify with the fury that comes when those who are supposed to help us actually make our lives more difficult. In fact, the emotional impact of these experiences can last a lifetime.

On the other side of the coin, none of us wants to acknowledge that sometimes we've been guilty of providing poor customer service. It is likely that even the most talented waitresses and IT techs, the most proficient cab drivers and receptionists, and the most qualified engineers and accountants have had bad days and took it out on customers—intentionally or not. What's particularly painful for those of us in higher education is the realization that even we, representing the colleges and universities of the United States, Canada, and Mexico have sometimes been **guilty of disappointing those we are supposed to help**.

That stings. We are supposed to nurture our communities, guide our students, and support our faculty and fellow staff. Yet, we can all remember an occasion when we as a community were less than helpful. We can all come up with reasons (or excuses): too many pressures, too much bureaucracy, not enough money, not enough time. The fact remains that we have not always followed

the Golden Rule and treated others the way we would like to be treated.

Below campus, the transit authority was putting in a new light-rail line. They were digging a tunnel, and that meant they were disturbing things, and that brought up some rodents. One day, a professor walks into a classroom where he is about to do a lecture, and there's a large dead rat on the floor. So he calls the facilities department. A guy shows up in a hazmat suit. He carefully puts hazard tape around the dead rat, and then he leaves. Just leaves it there.

– A 2016 APPA Thought Leaders symposium participant

The **pressure on higher education** to provide an exceptional experience is greater now than ever before. The competition between colleges and universities is too fierce for institutions to ignore how they treat students and their families. Similarly, the competition between academic programs for top-notch teachers and researchers is too keen for institutions to ignore how they treat faculty. Scrutiny from government agencies has never been more intense, and today's students approach colleges and universities with a consumer mind-set.

But the problem goes deeper. Higher education cannot continue to operate as it has. Costs continue to rise, while state revenue declines. Many local campuses do not control their tuition revenue. Some boards have implemented tuition freezes, while other institutions raise tuition to maintain quality, but this pushes the cost onto students. Students can no longer afford the increases, and although tuition discounting and financial aid reduce the real "sticker" price students pay, the level of student debt still soars, and tuition discounting rates cannot drop much further. The **situation is nearly unsustainable**.

The challenge to each institution depends on multiple factors: public versus private, large versus small, urban versus rural. A small private institution with a historic campus confronts issues quite different from those faced by a large land-grant university or urban community college. But while the specifics of the challenge are unique to each campus, overall trends hold across the industry.

The challenges push us to do better.

We who pursue the day-to-day work of running a college or university have to act now in whatever ways we can to make higher education a viable, valuable long-term proposition. That includes maintaining and enhancing our facilities. Higher education facilities organizations must act as **responsible stewards** of the buildings and grounds in their charge while seeking to ensure the long-term stability and preservation of the institution. In other words, we need to do better with as little money as possible. They've already shown themselves capable of meeting the challenge. Despite the financial impact of the recession and the simultaneous surge in enrollment, despite budgets that have remained flat even as the recession waned, and despite the challenges of maintenance backlogs, aging buildings, and changing pedagogies, facilities organizations have kept the lights on and the doors open. Very few institutions have had an interruption in programs or services because buildings failed. That is commendable in and of itself.

Facilities staff are **creative, innovative, and hard-working professionals**. Leaders have invested their budget dollars in data systems that allow them to manage their resources better. They've fought hard for preventive maintenance programs that extend the lifecycles of systems. They've found ways to stretch their staff and to control costs.

And we must do even more.

I was trying to get some information from the local cable company about my bill. I couldn't understand the different groupings of channels which had no explanation, just names like Extended Package. She couldn't explain it and kept naming the same channels in different groupings. I said, very politely, "I don't understand your explanation; is there someone else who can explain it to me so I will understand it?" She replied, "You're stupid." Then she hung up.

— Quoted from Kate Nasser, "The 25 Worst Customer Service Stories to Train the Best CSRs," The Smart SenseAbilities Blog, www.KateNasser.com.

Participants at the 2016 APPA Thought Leaders symposium believe higher education facilities organizations can do more. They can deliver an exceptional customer experience by engaging their staff and remaking their organization. They can create a culture of commitment to the purpose of the institution, one in which a focus on the customer and institutional mission drives decisions.

A tall order? Certainly. But not an impossible one, given a dedication to hard work, focused leadership, a systems approach to processes—with appropriate enabling tools—and training-enabled employee empowerment. Higher education facilities organizations are replete with fantastic individuals who step up and change the lives of their customers entirely on their own initiative. Organizations can and do **create cultures** in which the customer experience is prioritized. According to experts consulted for this report, outstanding service organizations create offerings, funding strategies, systems, and cultures that set their people up to excel *casually*.

Remaking the facilities organization with a focus on the customer experience will require institutions to look carefully at the culture they have created, since that's where the customer experience begins. Experts warn that starting with a list of customer service strategies is a short-term fix that almost inevitably fails. "I cringe when I hear an organization say this year they're going to put a new emphasis on customer service," expert Robert Spector, author of *The Nordstrom Way to Customer Service Excellence: The Handbook for Becoming the "Nordstrom" of*

REMAKING THE FACILITIES ORGANIZATION

Your Industry,” told APPA. “That’s like being in a relationship and saying, ‘This year I’m going to put a new emphasis on loving my partner.’”

Customer service shouldn’t be the next new management fad, the “flavor of the month,” Spector insisted. “Customer service is not a strategy. **It’s a way of life**,” he said.

Focusing on the customer shouldn’t be a program—it should be a culture shift. The good news about remaking your entire culture? The benefits extend **far beyond customer satisfaction survey results**. Facilities organizations with a customer-centric culture benefit in many ways, including streamlined processes, empowered and engaged staff, improved stewardship of campus resources, and loyal, enthusiastic customers who raise the status of the facilities organization on campus.

A woman’s 89-year-old grandfather got snowed in a couple years ago and didn’t have much in the house for meals. His daughter called several markets in the area to see if any of them had grocery delivery services, but the only one that said they did was Trader Joe’s. They don’t, actually, but were willing to help out this World War II vet. As the man’s daughter placed an order, the Trader Joe’s representative on the phone recommended other items that would be good for her dad’s low-sodium diet. An up-sell, you may be asking? Nope. They didn’t charge her a dime for the delivery or the groceries.

– Stacy Conradt, “11 of the Best Customer Service Stories Ever,” *mentalfloss.com*, December 15, 2015.

For the 2016 APPA Thought Leaders symposium, experts in customer service joined senior facilities officers as well as leaders in academics, finance, human resources, hospitality, and student affairs to analyze how the customer experience, both good and bad, drives customer loyalty. Participants sought to **identify the drivers behind customer service excellence**—to pull back the curtain and see what goes on behind the scenes at an exceptional customer-centric organization.

Participants then focused on the challenges facing colleges and universities and discussed the benefits a customer focus brings facilities organizations. Finally, the group examined the four core competencies of the facilities organization. They developed specific goals for **improving the customer experience and remaking the culture** in general administration and management; operations and maintenance; energy and utilities; and facilities planning, design, and construction.

The purpose of this report is both to inform readers and to prompt discussion on campuses. Senior facilities officers rely on the annual Thought Leader publications to generate new ideas about the built environment and institutional alignment. We encourage you to share this report widely across your institution and to discuss it within your department. We hope it sparks new ideas about remaking your organization to meet the challenges of higher education in the 21st century and encourages you to **create a culture that is customer-centric and engages your employees to deliver the exceptional**.

Author and business consultant Peter Shankman was getting ready to board a flight that was the last leg of a long day of traveling. It just happened to occur over dinnertime, and he knew he would be starving when he deplaned and headed home. So he tweeted, “Hey, @Mortons—can you meet me at Newark Airport with a porterhouse when I land in two hours? K, thanks. :)” Then he turned off his phone. Shankman said later, “Let’s understand: I was joking. I had absolutely no expectations of anything from that tweet. It’s like how we tweet, ‘Dear Winter, please stop, love Peter,’ or something similar.” Imagine Shankman’s surprise when he got off the plane to find a tuxedoed gentleman holding a bag that contained a 24 oz. Morton’s porterhouse, shrimp, potatoes, bread, napkins and silverware. Shankman noted that the tweet had to be noticed by Morton’s, someone had to get approval for the idea, a cook had to make his food, the food had to be driven 23.5 miles to the airport, and someone had to track down his flight information and figure out where he was landing to meet him at the right location. All while his stomach was grumbling on a 2.5-hour flight.

— Adapted from Stacy Conradt, “11 of the Best Customer Service Stories Ever,” *mentalfloss.com*, December 15, 2015; and Peter Shankman, “The Greatest Customer Service Story Ever Told, Starring Morton’s Steakhouse,” *shankman.com*, August 17, 2011.

Here’s the thing about great customer service: It doesn’t have to be as flashy as a guy showing up in a tuxedo and carrying a porterhouse steak, although that is impressive. It can be a genuine smile and a sincere thank-you. Great customer service can take the form of a supervisor listening to someone who just needs to be heard or a colleague

refilling a glass of iced tea on a hot day or a warm cup of coffee on a cold one. It can be a groundskeeper who takes pride in the roses or a custodian who makes the bathrooms smell fresh.

One participant at the Thought Leaders symposium told a story about the law school on his campus. The school has a tradition where the graduating class nominates an honorary class member who has made a significant difference in the lives of students. This individual is recognized at graduation and receives the same class ring as the students. Usually, the award goes to one of the law school professors. But one year, the class honored someone out of the ordinary: one of the custodians. The woman cleaned the law building, and she was a warm and welcoming presence to hard-working students. She had become “kind of the class mom,” the participant said. And at the end of the year, they recognized her for her contribution to the class.

That custodian took pride in her work, was empathetic, and was committed to these students and this institution. Undoubtedly, there are many more facilities professionals just like her going about their business in facilities departments across North America, delivering exceptional customer experiences every day. However, most don’t receive these sorts of accolades at the law school graduation. Yet they make an impact on the lives of students, faculty, administrators, and our campus communities.

Find those people within your organization. Nurture them. They are the flash point for transformation that will remake the facilities organization and create a culture of commitment and engagement that will withstand the challenges faced by higher education in the 21st century.

Section 3:

Understanding the Characteristics of the Best—and the Worst—Customer Service Organizations

Most of us immediately recognize excellent customer service when we experience it, but few of us spend enough time thinking about what goes into that experience. In fact, superior customer service doesn't happen by accident. It's the product of strategic decision making, smart policies, and targeted training by organizations that have discovered how to transform their cultures.

Senior facilities officers at higher education institutions must be part of the strategic thinking process that leads to decisions and policies that result in superior customer service. It's not enough to tell higher education facilities organizations that they must improve their customer service. Instead, senior facilities officers need a clear understanding of the elements of both good and bad customer service so they can implement the training, practices, and cultural changes that will create and reinforce service excellence and drive customer loyalty.

With this goal in mind, participants at the Thought Leaders symposium approached the concept of customer service from multiple angles. They drew on examples from their own experiences and from those of leaders in other industries. Then, they sorted through the stories and experiences for key lessons—lessons that were then validated with input from customer service experts. The result was a productive crash course in creating (and re-creating) exceptional customer experiences.

Bad customer experiences: Lessons learned from failure

Every consumer has endured bad customer service—service that annoys, offends, inconveniences, or even harms customers. Such experiences may be painful, but they are also instructive. That's why participants at the Thought Leaders symposium began their examination of improving higher education facilities organizations by analyzing

customer service failures. They looked at what goes wrong to understand what *should* go right.

What emerged from the discussion were four main characteristics of poor customer service:

1. Ineffective communication—both internally and externally.

When different departments and individuals within a company aren't communicating, it's the customer who suffers. One symposium participant told the story of trying to set up satellite TV service and getting different prices from different people in the company; what's more, he was accused of lying when he insisted on the price he had been assured he would get. Communication can also break down between customers and organizations, leaving customers feeling betrayed. For example, when an airline changed its policies without informing one Thought Leaders participant, he was left without recourse—and felt betrayed. "I told them I had been a loyal customer for 10 years, and their response was, basically, 'So?'"

Questions for Reflection:

How do you communicate with customers?

Who is responsible for customer communications?

How do you assess the effectiveness of your communications?

2. Rigid, inflexible policies.

Every organization needs rules and regulations to guide employees' actions, but some people get trapped by policies that just get in the way. This was the experience of

a symposium participant who was the victim of identity theft involving the U.S. Internal Revenue Service. Resolving the problem took months, and every path to a solution seemed blocked. “It was like being stuck in a black hole,” said the participant. “It was a nightmare—I felt so helpless.”

Questions for Reflection:

Do your employees understand the purpose of your policies?

How much do you empower your employees to interpret your policies to solve customer problems?

Data Point:

The importance of flexibility

How strict policies ruin the customer experience

How do you feel when you see a sign that reads “Absolutely No Returns”? When I see it, I take my business elsewhere. The sign tells me the company is inflexible and unwilling to take the time and energy to listen to my complaints.

I once exchanged a printer at an office supply company, only to find that it used different ink cartridges from the ones I’d bought for the previous model. I called and asked if I could return my unused cartridges. I was told I could, but when I got to the store, they said I could have only a store credit or a gift card. No cash. No credit card refund. Why? Because that’s their policy. And why is it their policy? The person at the desk had no idea, and that’s exactly my point. The shortsighted folks at corporate headquarters hadn’t given her the flexibility to stray from their rigid policy—even when it meant potentially losing a customer. They didn’t even give her the information to explain why she couldn’t.

— Lee Cockerell, *The Customer Rules: The 39 Essential Rules for Delivering Sensational Service* (New York: Crown Business, 2013).

3. Lack of a customer service culture.

Some organizations seem not to put a high value on the customer’s experience—and it shows. A straightforward purchase of an armchair dragged one Thought Leaders participant into a confusing and chaotic mess: weeks without communication, delivery trucks arriving at nine o’clock at night without warning, employees unable to communicate in the customer’s language, and phone calls unanswered by the original store. “The entire process was broken,” said the customer.

Questions for Reflection:

Are there processes in your organization that you know need fixing?

What is getting in the way of acting to improve those processes?

4. Lack of empathy, compassion, or concern.

When the family of one Thought Leaders participant gathered for a reunion, their enjoyment was cut short when one family member suffered a back injury and could hardly move. Being strangers to the city, all they could do was ask the hotel staff for help, but it seems the staff couldn’t care less. “We had no idea where to go for help, short of calling 911,” said the participant. “And no one at the hotel seemed to care. It wasn’t their problem.” What bothered the family the most, he said, was the lack of basic empathy for someone in pain.

Questions for Reflection:

Do your employees care about their customers? How do you know?

Excellent customer experiences: Principles of success

For most symposium participants, it was easy to bring to mind negative customer service experiences and much harder to recall positive ones. (This is a lesson in itself: Customers are more likely to recall bad experiences than good ones.) However, digging into the details of positive experiences can shed light on how organizations successfully satisfy their customers.

REMAKING THE FACILITIES ORGANIZATION

Participants identified three main characteristics of excellent customer service organizations:

1. The organization's culture and leadership prioritize the customer experience.

Some organizations have a well-earned reputation for prioritizing customer experiences. Nordstrom, for example, has remained successful by making its brand synonymous with customer service excellence. One participant at the Thought Leaders symposium experienced that excellence for herself when the store tracked down a dress that she had seen in a magazine. Nordstrom had sold out of the dress, but the sales staff located it from a competitor, bought it for full price, sold it to the participant for the Nordstrom sale price, and sent it straight to her door. "They've really got the customer service thing down," said the participant.

This sort of excellence only comes when companies build customer service into their entire operating culture. The importance of delighting the customer is emphasized at every level at Nordstrom, reinforced in training, and commended in company communications. So ingrained is the concept that when two customers showed up at a distribution center in Iowa, mistaking the center for a store, the staff welcomed them, sat them down at a computer with the Nordstrom website, and encouraged them to pick out what they wanted so it could be retrieved from the warehouse. "Those employees easily could have said, 'That's not our job. Good luck, go on your way,'" customer service expert Robert Spector told APPA. Spector, the author of *The Nordstrom Way*, has studied Nordstrom's methods for decades. Distribution center staff never interact with customers—their job is to ship merchandise around the country. But so deep is the commitment to service at the company that the distribution center staff found a way to satisfy their customers' needs.

Questions for Reflection:

Does your organization have a stated goal to make the customer happy, within the financial constraints that all organizations have? Could you make this a goal?

Data Point:

Questions raised by bad service

Why is service so bad?

Good service is still, for the most part, rare. In our experience as economic actors, in industry across industry, we're increasingly frustrated and disappointed. Customers, employees, owners—no one wants to deliver bad service, and no one wants to endure it. But that's the experience we continue to inflict on each other.

Why is that? . . . Why is service so hard to get right, despite the fact that we're wired for it?

Here's what we've learned: Uncommon service is not born from attitude and effort, but from design choices made in the very blueprints of a business model. It's easy to throw service into a mission statement and periodically do whatever it takes to make a customer happy. What's hard is designing a service model that allows average employees—not just the exceptional ones—to produce service excellence as an everyday routine. Outstanding service organizations create offerings, funding strategies, systems, and cultures that set their people up to excel casually.

—Frances Frei and Anne Morriss, *Uncommon Service: How to Win by Putting Customers at the Core of Your Business* (Boston: Harvard Business Review Press, 2012).

2. Policies and processes promote the customer experience.

It's not enough to promote good customer service; institutions must craft systems that prioritize the customer experience and minimize procedural roadblocks. One organization noted for its customer service ethos is the insurance company USAA. A symposium participant cited the company for its lack of bureaucracy—an unusual quality in an insurance company. In fact, USAA constantly looks for ways to adapt its policies to meet the needs of its customers.

Since the bulk of USAA clients are members of the military and their families, the needs of these customers are unique—but USAA understands them. It heavily discounts car insurance rates when clients are deployed overseas, for example, and was among the first adopters of mobile banking technology, allowing users to deposit checks by smartphone—an extraordinary convenience for troops stationed in Afghanistan or Iraq. The company has paid particular attention to customer service phone calls, one of the most frustrating experiences for most consumers. (One survey of 1,000 customers conducted by the Arizona State University W.P. Carey School of Business found that 68 percent reported feeling “rage” during a phone call with a customer service representative.) Call centers are driven by metrics, with most measuring call times down to the split second and imposing strict consequences for employees who can’t keep their calls short. For USAA, however, the only metric that matters is customer satisfaction.

Questions for Reflection:

When was the last time you reviewed your policies and procedures with an eye on their impact to the customer?

Could you ask your employees for their feedback on this topic?

3. Employees demonstrate key traits behind customer service, such as empathy, compassion, initiative, and flexibility.

Many of the most emotional stories about customer service experiences concern individuals who have gone above and beyond to help. One Thought Leaders participant described the behavior of the custodians in a university building that was being occupied by a student protest. Despite the tense situation, the housekeeping staff decided it was important that the building stay clean and functional, especially with the students sleeping on the floors and using the restrooms to clean up. The staff even came in over the weekend to keep the disorder under control. Those on both sides of the protest deeply appreciated the efforts of the housekeepers, who saw the protesting students not as troublemakers but as human beings who deserved clean restrooms.

Experts agree that customer service comes down to people interacting with people, and the people who represent your organization need certain traits for your efforts to succeed. Micah Solomon, *Forbes.com* contributor and author of multiple books on customer service—including, most recently, *High-Tech, High-Touch Customer Service*—highlights five characteristics:

- **Warmth** – Simple human kindness.
- **Empathy** – The ability to sense what another person is feeling.
- **Teamwork** – An inclination toward “Let’s work together to make this happen” and against “I’d rather do it all myself.”
- **Conscientiousness** – Detail orientation, including an ability and willingness to follow through to completion.
- **Optimism** – The ability to bounce back and not internalize challenges.

Solomon emphasizes that you can’t train staff to have these traits. “You can *sort of* teach people to smile, *sort of* teach them to favor teamwork. But it’s really hard if you don’t start with people inclined this way,” he writes in his *Forbes.com* article “How Hospitality and Customer Service Experts Hire for Customer Service Positions.” As the article title suggests, you must be deliberate about prioritizing customer service traits when hiring so you have the right staff on board.

Questions for Reflection:

If you are the senior facilities officer, how often do you interact with staff at all levels of the organization?

Do members of the organization at all levels have a sense that the senior facilities officer is engaged and involved in the department and is dedicated to encouraging staff to provide a great customer experience?

Have you included customer service traits in your repository of interview questions?

Data Point:

The Customer Experience

Showing customers you care

About 15 years ago, I was staying with my family at a resort in Hawaii. My daughter lost her ring in the pool, and so I asked the pool staff to keep an eye out for it. I was pleased when I overheard the pool staff talking to the grounds crew asking them to look out for it as well. The next day, the staff called me by name (I had only given them my room number) and said they were still looking for it. They found the ring the next day and brought it to our room.

This was an example of great hospitality, and they seemed to really care about what could have been a minor thing.

—John P. Morris, Associate Vice President, Facility Services, Northern Arizona University, Flagstaff, Arizona

Best practices from different industries

Consumer experiences provide a basic framework for thinking about customer service, but for a richer understanding we can look to industries focused on consumer experiences. APPA is grateful for the unique insights of Michael Bills and William Blodgett, who provided subject-matter expertise at the Thought Leaders symposium. Bills is director of human resources at JW Marriott Desert Springs Resort & Spa in Palm Desert, California; Blodgett is director of hotel operations at JW Marriott Starr Pass Resort & Spa in Tucson, Arizona.

Know your customers, and pay attention when their needs and expectations change. Customer needs change, and organizations must adapt along with them, according to Blodgett. High-end hotels, for example, have long prided themselves on the personal touch—a smiling clerk at the check-in desk and a knowledgeable concierge who can help with reservations at memorable restaurants. However, Millennials, the generation born after about 1980, prefer to do things for themselves online and avoid these sorts of personal interactions. “They

don’t want to talk to the concierge. They want to check in online without talking to a clerk,” said Blodgett. “They want things on their terms, and they’re forcing us to innovate.” Marriott is listening to its customers and seeking to rapidly introduce new services that will appeal to this generation. “We have to be deliberate about innovating or risk being irrelevant,” said Blodgett.

The critical lesson is that organizations must understand their customers. USAA, for example, retains military customers because the company understands their unique challenges. In addition to hiring veterans and military spouses to bring first-hand knowledge of military life into the organization, USAA has introduced company training for new hires that includes donning Kevlar vests and dining on MREs (Meals, Ready-to-Eat), which troops consume in the field. The goal is for every employee to appreciate the pressures their customers face and to keep on top of changing needs.

Questions for Reflection:

How do you keep informed about the ever-changing student culture? Or the evolution of teaching strategies used by faculty?

Make smart use of social media. Social media has been a mixed blessing for customer service organizations. The Millennials in particular don’t hesitate to make their opinions known in the most public ways possible. “They will go on social media and slam you,” said Blodgett.

Organizations will live or die based on their social media strategies; what’s more, when they die, it’s public and humiliating. In one excruciating incident, pizza manufacturer DiGiorno tried to exploit the success of the Twitter hashtag #WhyIStayed, in which women explained why they found it difficult to leave their abusive partners. Women didn’t find it funny when DiGiorno posted, “You had pizza.” Also painful was the photo posted by an American Apparel employee on the Fourth of July. The employee thought it depicted fireworks; in actuality, it was an image of the Space Shuttle Challenger explosion that killed seven people in 1986.

One response to such customer service catastrophes is to ignore social media completely, but organizations do this at their own peril. Not only does this make them seem out of touch and unengaged, but they are also shutting off an invaluable line of communication with their customers. Some 23 percent of adults online currently use Twitter, a statistically significant increase compared to the 18 percent who did so in August 2013. Twitter is particularly popular among those under 50 and the college educated. In addition, 82 percent of adults online ages 18 to 29 use Facebook. Marriott relies on feedback from Twitter and Facebook as well as review sites such as Yelp and TripAdvisor. The company uses aggregation software that seeks out mentions and reviews and funnels data to staff such as Blodgett, who receives hourly updates. As a result, Blodgett knows exactly what his customers like and don't like. When his hotel tries something new, the feedback is instantaneous and hassle free. With social media, Marriott doesn't have to ask its customers what they want, the company just needs to be responsive to what customers are saying.

Questions for Reflection:

Is your facilities organization using Twitter?
Facebook?

How could an active and engaged social media presence help your facilities organization connect with students and other customers?

Fine-tune workforce development to promote customer service. Excellent customer experiences don't begin when the customer walks in the door. They start when new employees are hired and trained by their organization. Finding the right people to interact with customers and giving them the proper education is critical. **"As you develop a culture of service, don't leave anything to chance,"** said Marriott's Blodgett. In addition to seeking out employees with personalities suited to their positions (front-desk staff, for example, must be extroverts), Marriott conducts training that goes beyond the task at hand. "I'm teaching the technical skills of running a front desk, but I also need to teach what luxury service is like," Blodgett said.

Data Point:

Social media strategy

Be careful what you wish for

Many organizations have found success with social media campaigns that encourage customers to post photos or pose questions. When done well, these campaigns help organizations engage with their audience; however, when executed poorly, they're opportunities for embarrassment.

- The Chicago Transit Authority hosted a Twitter Q and A with the transit fare card company Ventra using the hashtag #AskVentra. The plan backfired when annoyed transit riders tweeted a barrage of disparaging comments about the system.
- A similar campaign with Sea World erupted into a firestorm when the company-sponsored hashtag #AskSeaWorld was overwhelmed with angry questions from animal activists.
- The New York Police Department public relations staff hoped to create good feelings about community policing when they asked Twitter users to post photos of themselves with NYPD officers under the hashtag #myNYPD. They were appalled when instead of smiling group shots, they received disturbing images of alleged police brutality.

The takeaway? Social engagement works when the organization has a good relationship with its audience. Simmering resentment between an organization and its customers can ignite into full flame by a poorly timed social media campaign.

For online retailer Zappos, hiring, training and workforce development are central to its customer service efforts, which are widely recognized as among the best in the business. Zappos rigorously screens employees, who must undergo two interviews, one for technical skills and one for company culture. If employees can't live up to the company's 10 core values, they don't make the cut—and Zappos is highly selective. (Zappos compares its hire rate to Harvard's acceptance rate—about 1 percent.) Once hired, all employees—and that means all employees, including senior management—must participate in

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four weeks of training that emphasizes the company's unique culture and management approach. All employees are trained to answer customer calls and must work shifts at the call center, even if their job has nothing to do with customer service. So seriously does Zappos take the process that the company gives new hires the opportunity to walk away. In fact, Zappos will pay new hires around \$4,000 to leave if they don't feel they're a good fit for the organization. It's an unprecedented step for a company, but Zappos believes it's more important to hire staff who embrace the company's values than to "contaminate the culture" (the actual phrase used by Zappos) with employees who aren't fully committed.

Questions for Reflection:

Does your hiring process include an assessment of the "soft" skills needed to provide an exceptional customer experience?

What about your training process? Do you train new hires to interact with customers, understand customer needs, and provide a superior experience?

Identify and implement service standards to track and improve customer service. Some of the most successful customer service organizations place metrics at the heart of their efforts and have developed creative ways to track their customers' impressions. JetBlue, for example, was founded with the goal to "bring humanity back to travel," and the airline measures how well it's succeeding with a sophisticated survey system that asks customers to grade every aspect of their experience, from making a reservation to retrieving their bags. Survey results are correlated with operational data. This information is then channeled throughout the company, with the COO receiving big-picture analysis and flight attendants given feedback on customer compliments.

One of the greatest challenges in creating a measurement system is in deciding what to measure. Search online for "customer service metrics," and the first few pages offer articles with a bewildering number of metrics. In fact, each organization must determine the essential elements to measure based on its priorities.

Some organizations make the mistake of trying to measure too much, however. In their book *Outside In: The Power of Putting Customers at the Center of Your Business*, customer service experts Harley Manning and Kerry Bodine describe how FedEx created its customer experience metrics. The delivery company started by identifying the "touchpoints" where the organization interacts with the customer—for example, arranging for package pickup, checking expected delivery time online, and receiving a package at your door. FedEx initially identified roughly 250 customer touchpoints, far too many to measure effectively. The company had to focus in on the touchpoints used most often and with the most significant effect on the customer's experience.

Metrics can go beyond problem solving to significantly improving the customer experience. Zappos, for example, measures what it calls the "happiness experience" for all its calls, asking, "Did the agent try to make a personal emotional connection?" and "Did they provide a 'wow experience'?" Building these questions into the company's metrics allows Zappos to promote the enhanced customer experiences the company seeks to provide.

Questions for Reflection:

How do you measure the customer experience?

What standards are most important to your organization? How do you know if you're meeting those standards?

Empower employees to make decisions and take initiative. Few statements are more infuriating to a customer than an employee saying, "I can't do that." Clearly, sometimes employees can't do what customers want, especially if health and safety are on the line; in fact, the customer isn't always right. However, often employees are limited by organizational policies that get in the way of great service.

Organizations known for excellent customer service empower employees to meet customer needs. Nordstrom, for example, makes its policies as simple as possible. Its employee handbook states, "Use good judgment in all situations." That's it. Employees are allowed and encouraged to do whatever they consider necessary to

Data Point:**The Customer Experience***Hiring for commitment and willingness to get the job done*

The Air Force Academy has contractors in charge of the custodial needs of the largest residence hall in America—with more than 2,000 cadets. They repeatedly had poor service. Finally, they gave Goodwill the contract. More than 400 disabled people took over custodial duties.

They were the most responsible, loyal custodians ever, and the cadets loved them. They provided great customer service. The lesson is that it's dedication and willingness to do your best that makes the difference.

—A 2016 Thought Leaders symposium participant

satisfy the customer. This policy of empowerment has kept Nordstrom successful through the ups and downs of more than a century in business.

Questions for Reflection:

How much individual authority do your employees have?

Do any of your policies get in the way of empowering employees to provide exceptional experiences?

The big picture: Essential characteristics of excellent customer service organizations

Combining insights from personal customer service experiences with lessons learned from other industries, participants at the Thought Leaders symposium synthesized what they learned into a list of the essential elements of creating exceptional customer experiences.

Culture and leadership: The organization's culture and leadership make the customer experience a priority.

Data Point:**Employee autonomy***Why employee empowerment matters*

Employees selected, oriented, and reinforced properly, surrounded by peers of the same caliber, will thrive when given significant autonomy. Otherwise, they'll wither. There are dozens of studies to support this, inside and outside of business life.

You want customer relations to be on the shoulders of your employees. But as long as you're defining every little thing, and rewarding/punishing based on seemingly arbitrary and thus, inevitably, gamed criteria, you won't get them to carry that responsibility. Their viewpoint will soon resemble the jaded flight attendant's attitude on a big legacy carrier who told me the other day, "The more emphatically Management comes up with new i's to dot and t's for me to cross, the less seriously I take them. I know these rules will be gone within the year, and a new group of regs will take their place."

—Micah Solomon, "How Ritz-Carlton and Four Seasons Empower Employees and Uphold Customer Service Standards," Forbes.com, October 28, 2013.

An exemplary customer experience begins long before the first customer interaction. It starts with a core belief that customers matter, that their experience should be positive, and that making people happy is critical to the organization's success.

Key elements of this philosophy include the following:

- **Customer service culture starts at the top.** If senior leaders don't believe in customer service, neither will frontline staff.
- **The value of customer service is communicated—and communicated often—to all employees on every level.** It's not enough to say it once. The message has to go out day after day.
- **The institutional mission includes—or is consistent with—excellent customer service.** Organizations can have many goals—to maximize profits, create the best technology, or provide a first-class education. If the

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user's experience isn't part of that mission, it will be difficult to make user experience a top priority.

- **Resources are available to support customer service efforts.** Employees know when a goal is all talk and no action: They see it in how the organization invests its time and money. If nothing is put toward improving the customer experience, employees will spend little effort on it themselves.
- **The organization knows who their customers are and what they want.** The most successful customer service companies know the ins and outs of their customers' lives, understand their problems, and appreciate their points of view.

Questions for Reflection:

How would you characterize your organization's culture? Is it truly customer-centric, or is the focus elsewhere?

How do you create a culture in which a highly skilled employee with decades on the job wants to create an exceptional experience for every customer, even the 18-year-old newly arrived on campus?

Policies and processes: The organizational structure and policies of the organization promote customer service. Core beliefs about customers are only beginning concepts; these beliefs are put into action with policies about hiring, management, and metrics. According to experts Manning and Bodine, effective organizations create a highly functional "customer service ecosystem"—that is, a web of relationships and touchpoints that determines the quality of all customer interactions.

Key elements of a successful customer service ecosystem include the following:

- **Customer service is emphasized from the beginning of the hiring process through training, mentoring, and professional development.** Remember the words of Marriott's Blodgett: "As you develop a culture of service, don't leave anything to chance." Start from day one to get the right people on board, and never stop training them.

- **Processes are in place to seek customer feedback and note customer experiences on social media.** It's impossible to know what customers are experiencing without asking them.
- **Employees are empowered to solve problems, encouraged to take initiative to satisfy customers, and rewarded for innovative ideas.** Successful companies trust their employees to use good judgment and reward them when they demonstrate ability and success.
- **Policies are transparent to customers and employees, and employees know when they can bend the rules and when the rules are firm.** Even companies with the greatest reputation for employee empowerment still have rules. Southwest Airlines may give its staff significant flexibility in handing out free drinks, but Federal Aviation Administration rules are fixed—and everyone knows it.
- **The organization keeps customer service in mind when planning for emergencies and develops crisis plans that include communication components.** A crisis can either expose an organization's weaknesses or shine a spotlight on its strengths.

Questions for Reflection:

Which policies in your organization are nonnegotiable, and which have more room for individual judgment? Do your employees know the difference?

Behaviors and traits: Employees demonstrate key traits behind great customer service. Training can turn a promising customer representative into a superb customer representative, but it can't work miracles. Without a certain level of commitment, efforts to improve service will only go so far.

That doesn't mean that every employee needs to be an extroverted service whiz. It does mean that employees should demonstrate at least these essential characteristics:

- **Ownership.** Employees take responsibility. They take pride in their work and in the mission of the organization.

Data Point:**Employee empowerment and commitment***Owning a problem to resolution*

A woman customer was shopping at the Nordstrom store at the South Park mall in Charlotte, North Carolina. It was near closing time. She tried on some clothes, made some purchases, and went directly home. That night, before going to bed, she discovered that a 2.8-carat diamond from her wedding ring was missing. She assumed that she lost the diamond at Nordstrom.

The very next morning, she came to the store when it opened and headed over to the women's department, where she had last been. She got down on her hands and knees, searching for the diamond.

Eric Wilson, the loss prevention agent for the store, noticed the customer crawling on the floor and asked how he could help. After she explained the situation to him, Eric got down on his hands and knees and joined the search. No luck. He took the customer's contact information and told her he would follow up.

Eric then contacted two employees in building services, Bart Garcia and Tom Fraley, who joined in the search. Again, no luck. Perhaps the diamond was in one of the vacuum cleaner bags? They gathered the vacuum bags and began splitting them open and sifting through the dirty contents. Eventually, voilà! They found the diamond.

Clearly, Eric Wilson took the initiative. His job description did not include scrutinizing full vacuum cleaner bags. He could have told building services about the lost diamond and then moved on with his tasks for the day. But the customer wanted someone to find her diamond. Eric owned the situation. He figured the best approach to solving the problem and made a difference in a person's life.

— *Robert Spector and Patrick McCarthy, The Nordstrom Way to Customer Service Excellence: The Handbook for Becoming the “Nordstrom” of Your Industry, 2nd ed. (Hoboken, NJ: John Wiley & Sons, 2012).*

- **Initiative.** Employees feel empowered. They don't ignore problems that aren't specifically theirs. They think creatively about the operation of the organization. In the 1980s, Toyota revolutionized the assembly line by allowing any worker to stop production when he or she saw a problem. That level of trust enabled the company to significantly improve the quality of their final product while increasing employee morale. It's a lesson every organization can learn.
- **Mission and stewardship.** Employees embrace the mission of the organization. They have a sense of stewardship toward the resources of the organization and make the most of the trust granted to them. Organizations need employees who embrace the mission and see themselves as part of the big picture.
- **Empathy.** Employees understand the perspectives of customers and other stakeholders and act with compassion and concern. Often, all a frustrated customer really needs is a sympathetic and heartfelt “I'm sorry.” Connecting on a human level takes customer service from rote interaction to meaningful exchange.

Questions for Reflection:

Do you consider the traits listed above when hiring new staff?

Do you emphasize these traits in your training?



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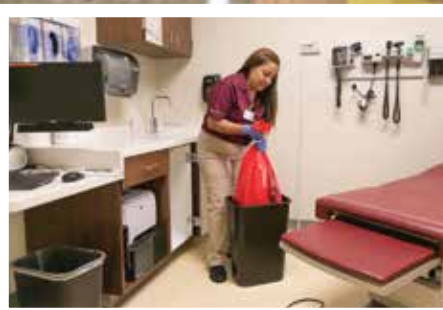
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