

July/August 2005

VOLUME 21

NUMBER 4

Facilities Manager

The official publication of APPA: The Association of Higher Education Facilities Officers



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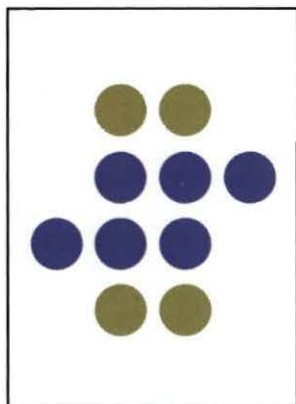
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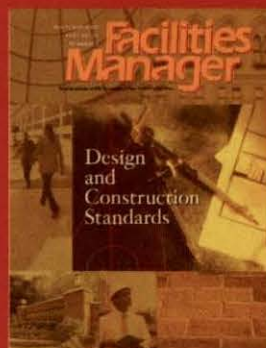
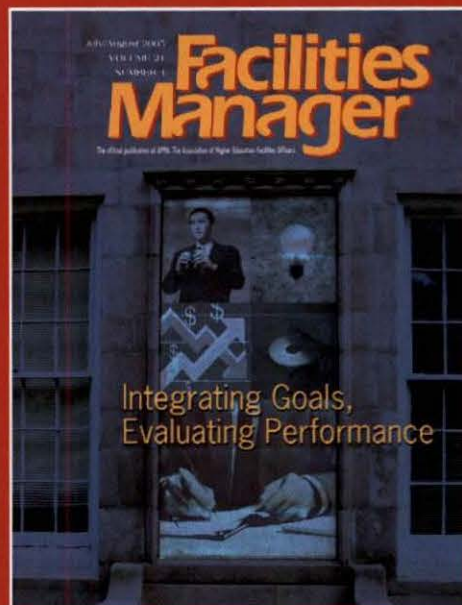
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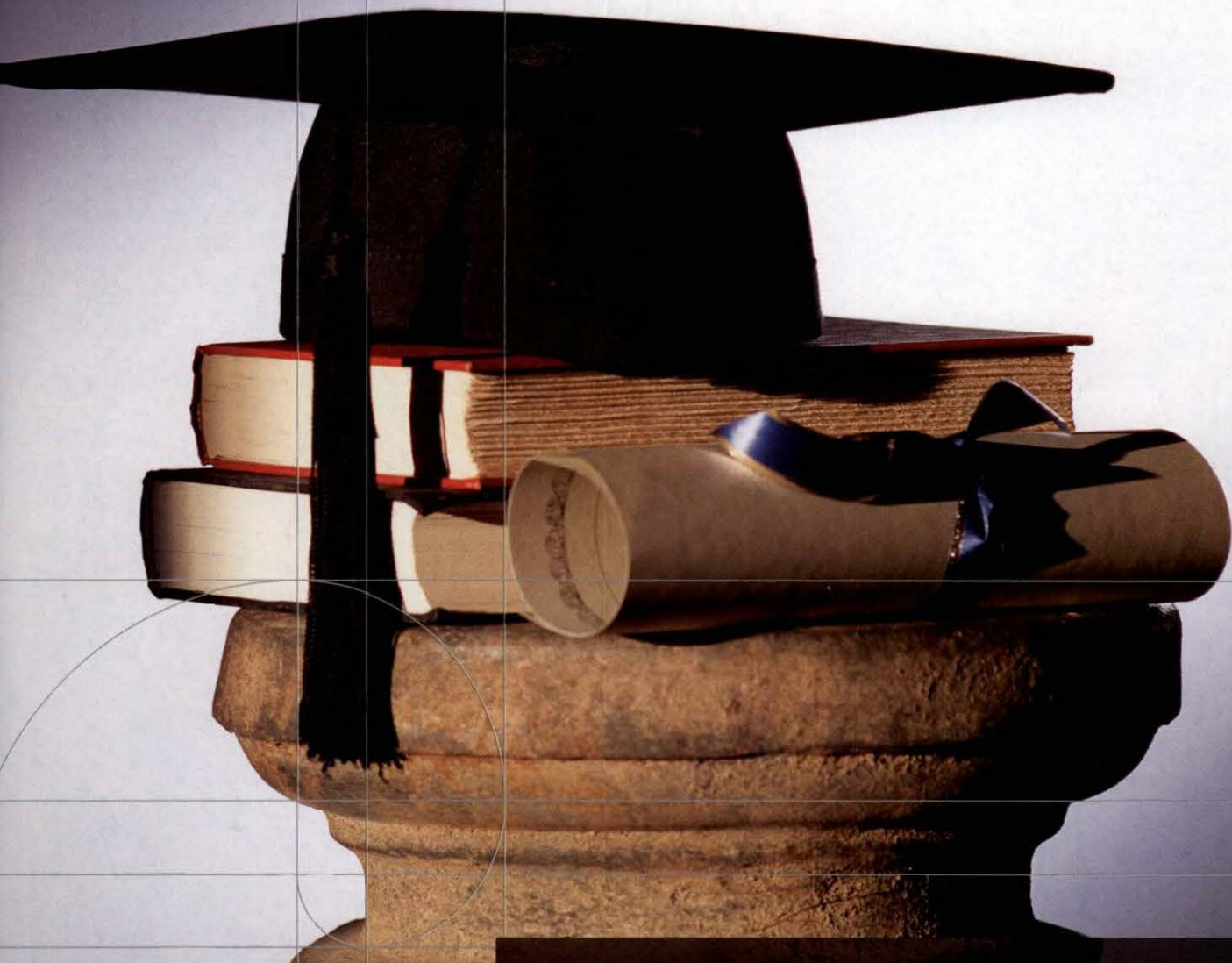
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Global Partner in Learning

From the Editor

by Steve Glazner

Leonard Friesenhahn Receives 2005 Rex Dillow Award

Since 1987 APPA has presented the annual Rex Dillow Award for Outstanding Article in *Facilities Manager*. The winning articles are of the highest quality of those published in the magazine each year, and the difficult selection process is managed by APPA's Information and



Research Committee, led this year by Michael J. Sofield of the Smithsonian Institution.


We are pleased to announce that the 2005 Rex Dillow Award is given this year to Leonard Friesenhahn, P.E., manager, energy and utilities management, of the University of Texas at Austin. His article—his first written for *Facilities Manager*—was "The University of Texas Sewer Rehab: Using Trenchless Technologies" and was published in the September/October 2004 issue. Leonard is being presented his award at the 2005 APPA Forum in Orlando, Florida.

In his award-winning article, Leonard discusses how the complex yet aging sanitary sewer system at the university was rehabilitated using an innovative process to restore life to the aging sewer mains without the inconvenience and significant expense of the traditional open-cut method.

The award is named for APPA member emeritus Rex O. Dillow, formerly of the University of Missouri-Columbia, who contributed much to the development and improvement of APPA's publication and education programs during his active membership in the association. There were 18 eligible articles for the 2005 award. Congratulations to Leonard Friesenhahn for his excellent work.

Past President Charles Butler Dies

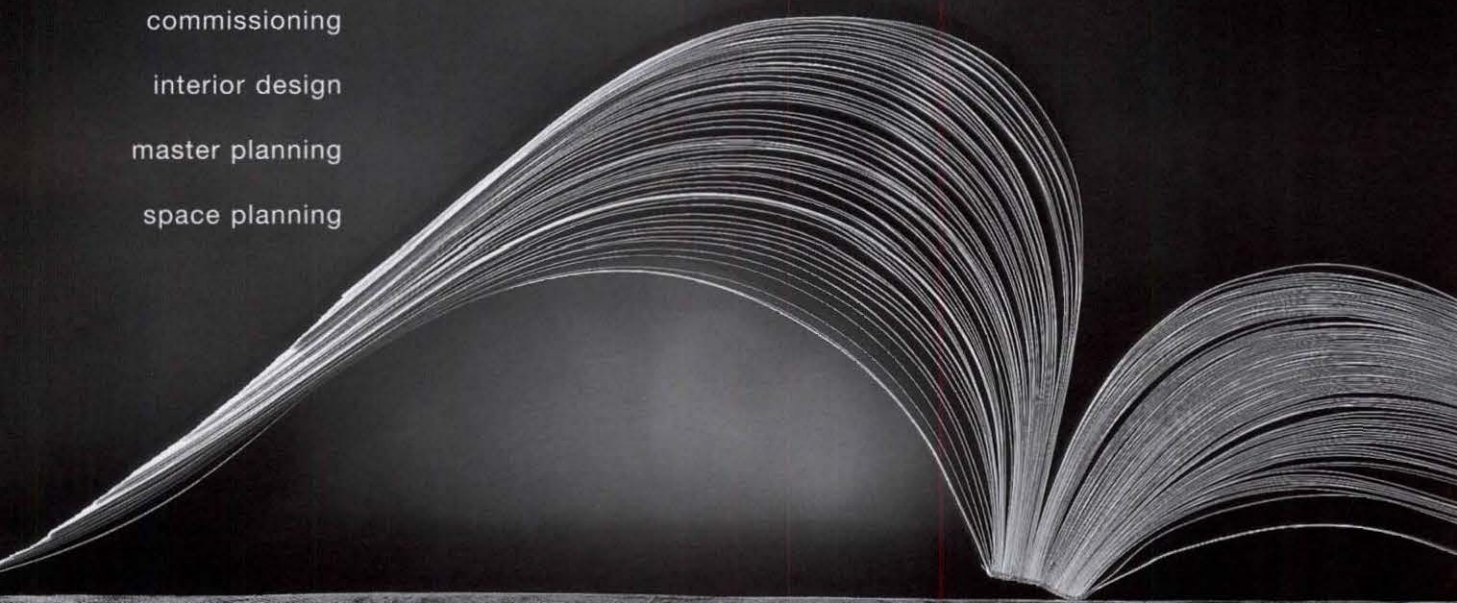
Charles W. Butler, APPA President in 1979-80, passed away on May 24. He had

lived in Sevierville, Tennessee since his retirement from the University of South Florida. Charlie was an active member of APPA and of the Southeastern Region throughout his career in higher education. He was a dapper presence at numerous APPA and SRAPPA conferences even after his retirement. In 1982 Charlie was the recipient of the Meritorious Service Award, APPA's highest individual honor for service. 



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President's Report

by Edward D. Rice

It has been an honor to be president of APPA this year and serve as your representative at several functions. During my term as president, I have focused on grass-roots membership efforts, including the importance of chapters. We are only as strong as the support given by the membership and because of this support, APPA is a very strong association.



It was heartening and exciting when APPA published *Building Blocks for APPA Membership Growth*, our grass-roots web-based e-manual for recruiting and retaining membership as well as a recruitment kit. Recently, Randel Edwards, director of member services, provided a report on membership this year. The report does not include emeritus, honorary, retired, student, or regional-only members, and breaks down as follows.

Institutions—1314

Institutional Associates—2795

Affiliate—196

Affiliate Associates—108

Business Partners—308

Business Partner Associates—192

Total 4913

These figures are comparable to last year in many ways. The business partner category continues to be strong. Affiliate numbers are about the same. The number of institutions is a little lower but only by about 2 percent. Our total number of members is approximately 1 percent higher than at this time last year. Member Services attributes this gain to the APPA leadership and their individual efforts related to retention and recruitment, which is instrumental to the health and strength

of our organization. The grassroots e-manual and recruitment kit also played an important part in retaining and recruiting members and will continue to do so.

Two new strategic alliances were signed this past year with ISSA (International Sanitary Supply Association) and ASHE (American Society for Healthcare Engineering) and have already proven fruitful. Submittals for both institutional and individual awards were strong this year and as Alan Bigger, vice president for professional affairs stated, "Making the competition for recognition positively fierce." The Facilities Core Data Survey had over 200 institutions return the survey. A new CFaR (Center for Facilities Research) survey was conducted and focused on the impact of facilities on student recruitment and retention; I am eagerly awaiting the data this will provide. In addition, there are currently eight other active CFaR projects in progress.

Attendance at the Institute for Facilities Management in January 2005 increased from the previous few years. APPA also offered Track I of the Leadership Academy and the Supervisor's Toolkit training program simultaneously with the Institute, which will be planned as a regular feature at future Institutes. CEUs will be offered for several sessions at the Educational Facilities Leadership Forum this year in Orlando fulfilling one of my goals. The Leadership Academy underwent an extensive review and is now offering four program tracks.

In March, Janet and I traveled to the AUDE Conference at the University of Surrey in Guildford, Surrey, England. Derry Caleb, director of estates at the University of Surrey, hosted the conference and did a splendid job of it. It was a wonderful experience to visit with

our colleagues in the United Kingdom. And now, as the year winds down, I am looking forward to our upcoming Forum in Orlando. Our children and grandchildren will be with us and are excited to be going to Walt Disney World. I hope other APPA members take advantage of this beautiful location to enjoy some vacation time either before or after the Forum. See you in Orlando.

Immediate Past President's Report

Brooks H. Baker III

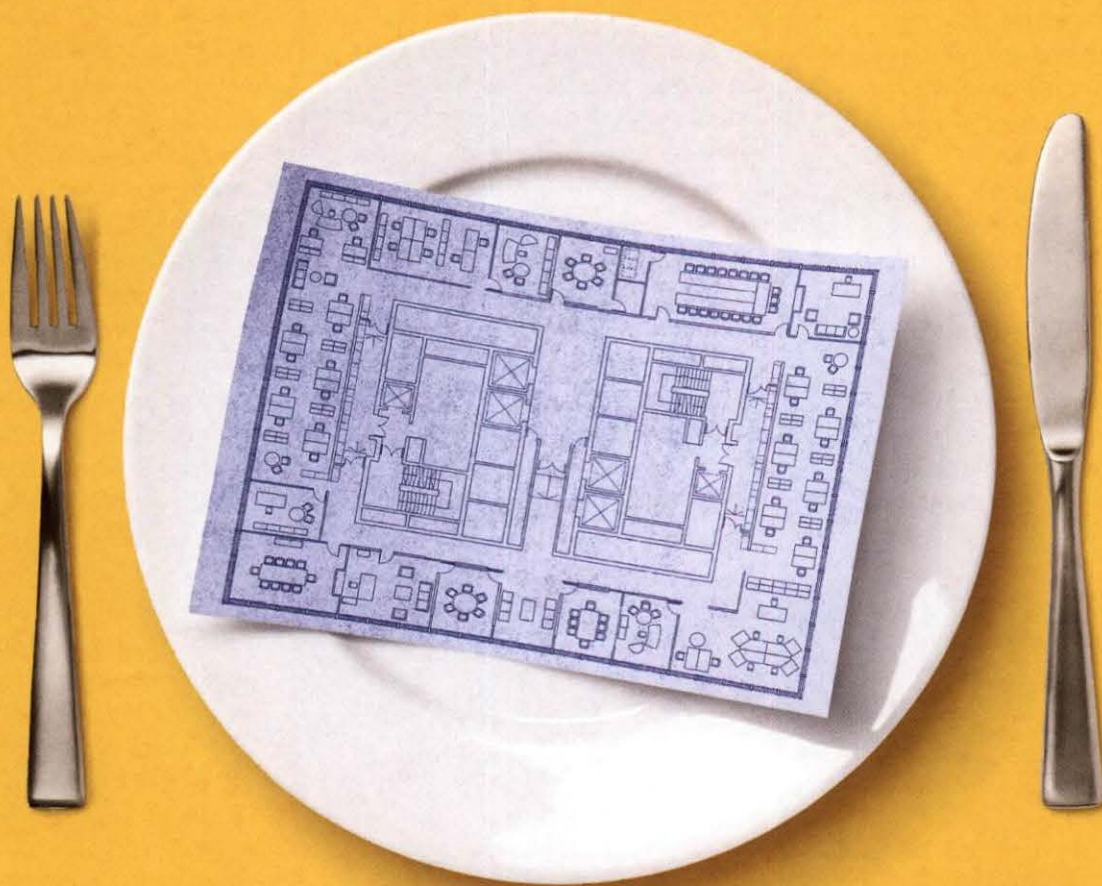
As I write this, it has become a difficult reality that my time on the Board of Directors of the greatest organization in the country is drawing to a close. I chose to write this last article for *Facilities Manager* magazine while taking a break at a Starbucks restaurant near our campus. I am sure you are already asking yourself what does this have to do with anything regarding facilities, but in some ways it is very relevant. First of all, I just paid \$4.00 for a cup of coffee, specifically a wonderful breve latte. Every time I do that, I ask myself how can they charge \$4.00 for a cup of coffee and get me to buy it? I'll answer that question shortly, but I also wanted to mention a strange anomaly that is going on at the market down the road. My youngest daughter Amy goes to this market to buy food for her family (including my three wonderful grandchildren) and shops for food labeled either "all natural" or "organic." As you might have



Continued on page 8

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Continued from page 6

guessed, she pays an exorbitant price since labeling food as organic or all natural drives the price up significantly. Many of you have heard me talk about or have read in my articles about a cattle farm where I raise Angus cattle for beef. I market my cattle as "all natural" Angus beef and request a price about 50 percent higher than much of the competition for packaged beef.

Now, what do these three examples have in common? Starbucks has learned how to market a product at a price significantly beyond what any of us were willing to pay a few years ago; my daughter pays a significantly higher price for her groceries; and, fortunately, my beef customers pay more for their products than any of us would have imagined some time back. All of this is done because the perceived value of

what the customer is getting is worth paying the price being asked. We need to continually ask ourselves in our profession and in our institutions if we are perceived as a "value added" organization or are we perceived as a low-cost alternative to something worse. There is a reason why each of us is in a position of responsibility at our institutions and we need to examine each day as we arrive at work the reasons they may want us to continue in our jobs, or why they may want to continue to have our organizations provide services the next day.

Complacency is a disease that seems to lie dormant in all of us, and we must continuously fight the temptation to let that complacency become dominant in our attitudes and actions each day. The very best resource available through which our facilities managers can combat complacency is APPA. Did

you know that the tools available through APPA (the association of choice for educational facilities managers) include new technologies and management ideas that can invigorate even the most seasoned and possibly stale individuals? The desired outcomes of collaboration, competency, and credibility drive APPA to provide resources to keep us motivated and technically sharp. Be sure that you don't add a forth "C" to this group called complacency. The problem with complacency is that it comes on us slowly and deliberately; we may not even recognize it until it is too late.

Utilize the resources of APPA such as the Educational Facilities Leadership Forum, the Institute for Facilities Management, and the Leadership Academy to reinvigorate yourself individually so that you can go back and revitalize your whole department or your whole facilities organization. Utilize the numerous publications such as *Facilities Manager* magazine and the almost endless printed resources that are available through APPA. Introduce your staff to the Supervisor's Toolkit, and the other extremely exciting opportunities that are being offered by APPA.

Finally, I can't leave you without another comment about code advocacy and code awareness. Several members of APPA are actively participating in NFPA, ASME, ASHRAE, and other national code setting entities. Our university has individuals who are locally active in combating legislation that will increase our costs through what I like to call "vendor-friendly laws." Be sure to read the Code Talkers column in each issue of *Facilities Manager* and look for special programs on code advocacy at the Forum and other APPA educational offerings.

Thank you so much for the opportunity to be of service for the last few years. I had intended to retire from my

Continued on page 10



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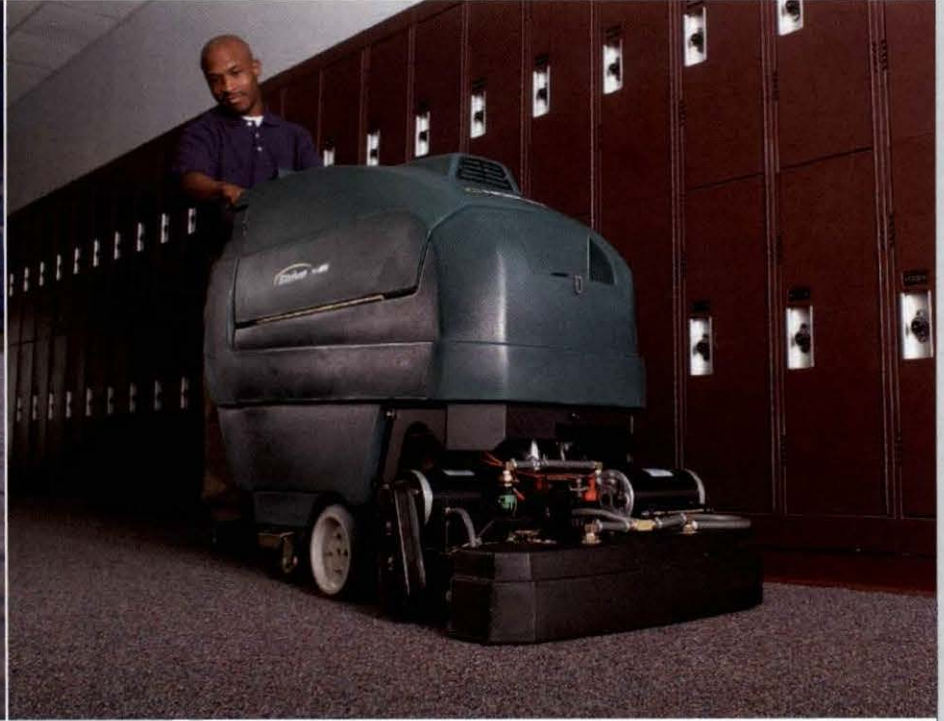
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Continued from page 8

job at the University of Alabama at Birmingham when my APPA tenure was up, but I have become so invigorated and non-complacent as a result of my activities with APPA that I have informed my boss that I plan to stay around for several more years. I specifically told my staff that I was going to stay until we were able to complete our new campus green and bell tower projects, which are just now being designed and are yet to be funded. My staff immediately went out and started trying to raise the money to build the tower themselves. If they can't raise the money, some promise they will lay the bricks personally to get the project completed soon.

God Bless Y'all.

President-Elect's Report

Jack K. Colby

Strategic Alliances

TEFMA

The new relationship with Tertiary Education Facilities Management Association (TEFMA) as a strategic partner provided a wonderful opportunity to visit seven campuses in New Zealand and Australia to see old acquaintances and to meet APPA members in the area. TEFMA President Joe Hollander was an excellent host and provided helpful advice with our travel plans. At the meeting in Hobart, Tasmania in September 2004, I had the opportunity to address the TEFMA Board regarding opportunities for strengthening relationships under the new alliance. I also spoke with Alan Egan, incoming TEFMA President, regarding alliance activities for the coming year. It was an honor to be



invited to make a presentation to the conference titled "Taking the Devil out of Generational Differences," which was well received. I also participated on a panel that explored options for the development of a new university and identified the many challenges that institutions will face in the future.

It was a great pleasure to talk with Bill Humble and Maurie Pausey, charter members of the organizing group that later became APPA. Visiting New Zealand and Australia was a unique opportunity to view educational facilities from an international perspective and to enjoy the hospitality of our Australasian APPA and TEFMA members.

ACUHO-I

Under the existing strategic alliance with ACUHO-I (Association of College and University Housing Officers-International), APPA cosponsors the workshop for housing facilities professionals. I was very pleased to be invited to deliver the keynote address on "Building Partnerships" for this year's workshop in Tampa. At the meeting, I met with ACUHO-I Executive Director Sallie Traxler to open discussions on renewing the strategic alliance between our organizations.

2006 Joint Meeting

As a member of the planning committee for 2006, I met with APPA, NACUBO, and SCUP volunteers and staff in Baltimore to complete planning and formats for the 2006 Joint Meeting in Honolulu in July 2006. The group developed opportunities for marketing and communications for this important meeting.

Committee Charges

At the December 2004 meeting of APPA committees, I requested that the committees explore activities in the following areas: 1) Evaluate professional certification opportunities for

APPA members; 2) Investigate generational differences and the issues that they pose for APPA's role as the "Association of Choice"; 3) Evaluate and renew strategic alliances with other organizations; and 4) Establish close ties with TEFMA through activities identified in the new strategic alliance.

GAPPA Meeting

This past May, I was fortunate to finally be able to attend the annual GAPPA meeting in Jekyll Island, Georgia. President Bob Hascall, Past President Lee Richey, and Vice Presidents David Smith and Harvey Shumpert were wonderful hosts. It was an honor to speak at the closing session about APPA's services to its members and the expanding relationships that APPA has with chapters like GAPPA.

CHEMA Meeting

In June, I attended the annual meeting of the Council of Higher Education Management Association in Minneapolis to order to network with other volunteer leaders and to obtain training on the best practices for association management. APPA's joint meeting with NACUBO and SCUP was showcased as an outcome of good relationships with our fellow associations.

ASHE Annual Meeting

In 2004, APPA entered into a strategic alliance with the American Society for Healthcare Engineering (ASHE). In support of the alliance, I presented a session on generational differences at their annual meeting in Anaheim. It was an excellent meeting and a great opportunity to establish stronger relationships with our alliance partners.

It has been a pleasure to represent APPA at many meetings this year. I look forward to moving ahead with the issues that I feel are important to APPA and for the opportunity to lead the Association.

Secretary-Treasurer's Report

Robert J. Carter

Over the last year we have achieved several key financial and membership goals. In the financial area we have paid off the mortgage on the APPA headquarters building and now can redirect the mortgage interest savings into services. In addition, we have exceeded our targeted surplus from operations despite a continuing chill in the financial situation for higher education.

In the membership area, through the efforts of the Membership Committee and the Member Services staff, we have developed several key tools, including a formal recruitment kit and a grassroots e-manual titled *Building Blocks for APPA Membership Growth*. Another publication, *Guidelines on Achieving Diversity*, was completed and sent to all APPA chapters to help support their efforts in achieving diversity.



Financial

In the fiscal year ending March 31, 2005, there continued to be financial challenges for the Board and for the APPA staff. I am happy to report that through the herculean efforts of both the staff and Board, we ended the fiscal year with a surplus of \$105,067 which includes an unrealized gain (\$26,451) from equity investments. Of this, \$50,000 was contributed to the Board established operating reserves. The remainder will stay in current assets. Our reserves now stand at \$898,000 or 75 percent of the \$1,200,000 goal which represents 25 percent of the operating budget and 10 percent of the estimated replacement value of our physical assets and equipment. The graph on

page 12 shows the six-year history of revenues and expenses for APPA.

There is also good news with respect to APPA's equity investments which ended the year with a positive overall return owing to the continuing recovery of the equity markets. The investment objective for this portion of the reserve is long-term capital appreciation and fluctuations in the magnitude of returns will occur from year to year.

There are several factors that have affected our financial performance. APPA continues to maintain stable membership numbers and dues revenue. Educational programs (Institute for Facilities Management, Leadership Academy, and Educational Facilities Leadership Forum), publication sales, Job Express, and Facilities Management Evaluation Program (FMPEP) are well received by members and remain strong. Supervisor's Toolkit:

Nuts and Bolts of Facilities Supervision has added a new dimension to strengthen the facilities management professionals. APPA's return on its investment in the development of this program will be rewarded professionally and financially. On the expense side, the major concern with respect to last year's performance and going forward through the year is the substantial increase in food, beverage, and other hotel expenses for APPA's educational programs. Our experience is that the escalation in the cost of these services has been far greater than the inflation rate in the economy in general. This affects the financial performance of our educational programs such as the Institute, the Academy, and the Forum. The revenues for the year by category are shown on graph 2 on page 12. Graph 3 indicates how APPA expends funds to achieve our mission

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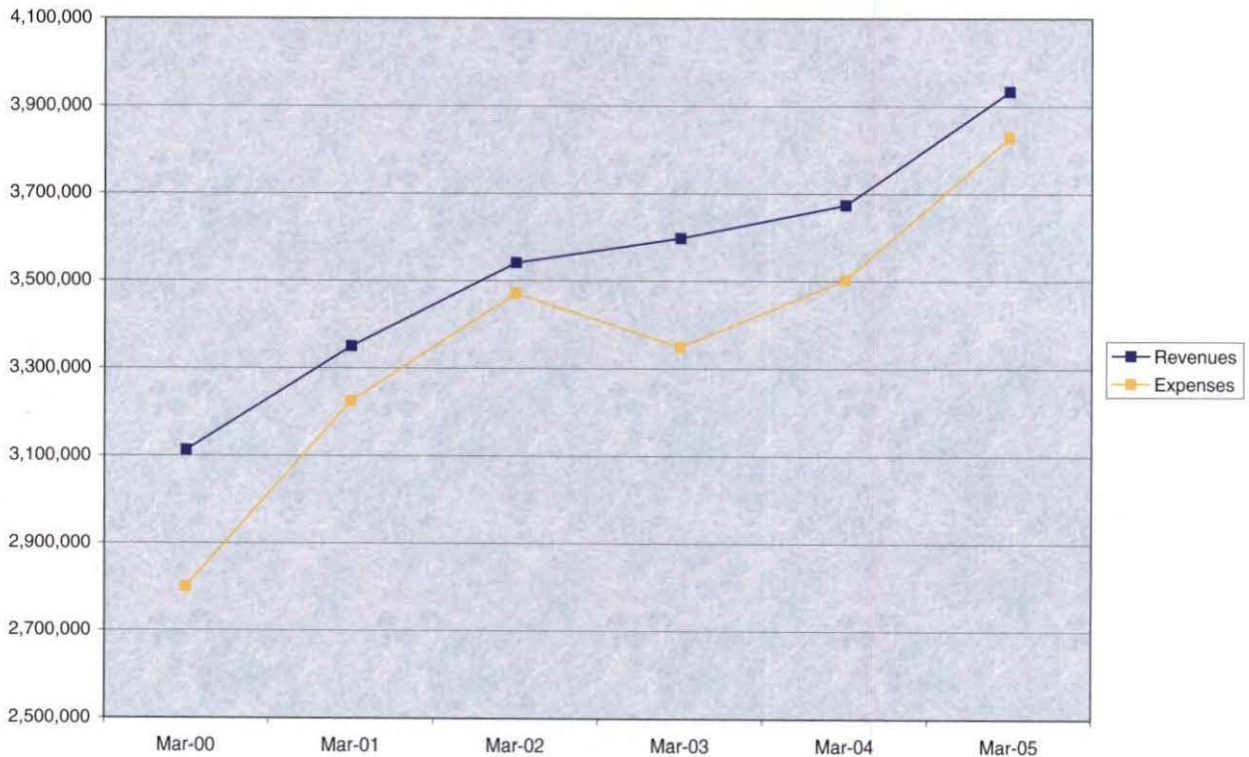


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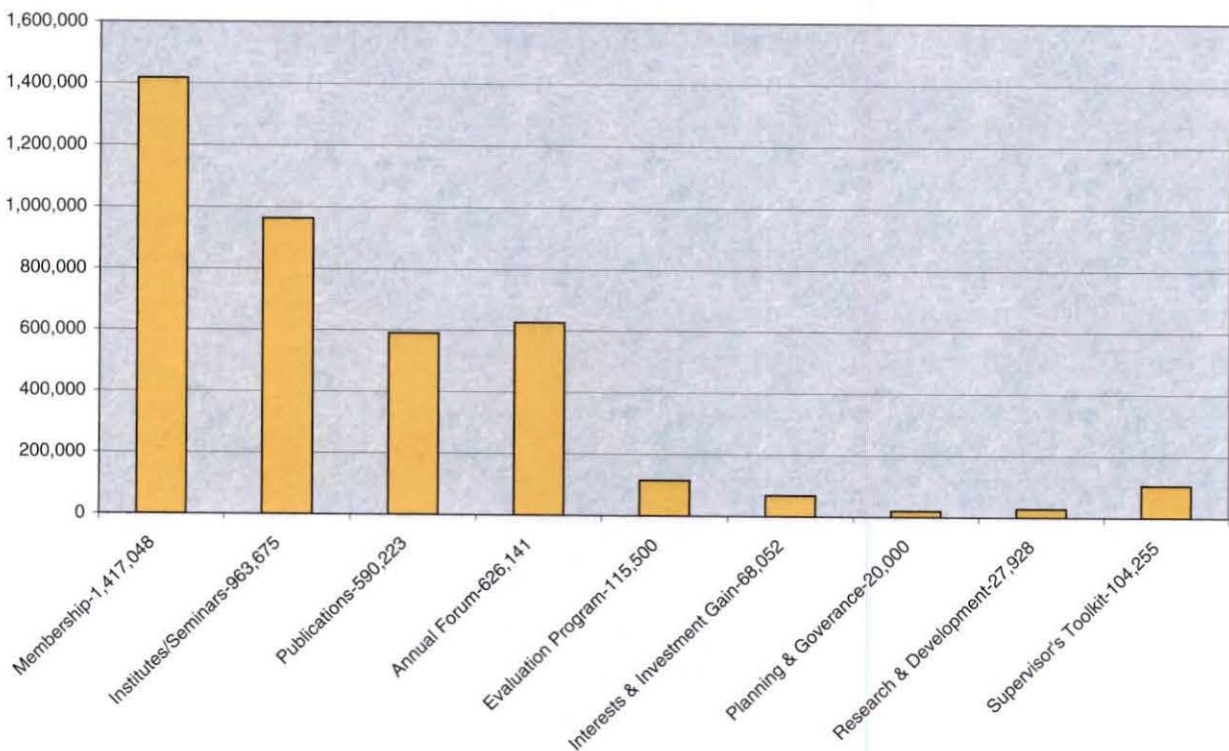
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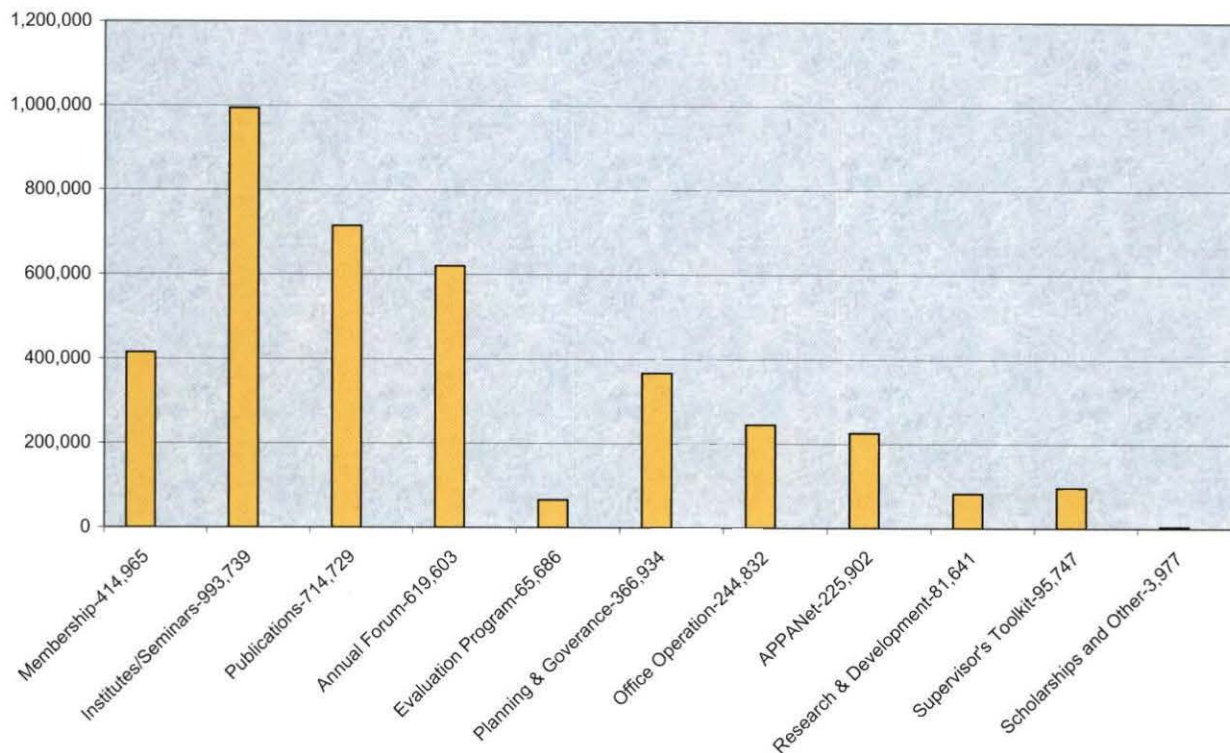
Graph 1. APPA's History of Revenues and Expenses



Graph 2. 2004-05 Sources of Funds (Revenues)—\$3,932,822



Graph 3. 2004-05 Uses of Funds (Expenses)—\$3,827,755



of supporting educational excellence with quality leadership and professional management through education, research, and recognition. In fulfilling this mission, APPA uses the majority of its revenues to fund education, member services, and publications.

I want to stress to the APPA membership that an excellent job was again done this year by the APPA staff in controlling expenses and managing the entire budget. On behalf of the membership, I would like to offer my sincere appreciation.

Membership Committee

Some of the notable committee activities over the past year include the following:

Community Colleges

During the 2004-05 membership year, nine new community colleges joined APPA. We have one new community college member so far during

the 2005-06 membership year that began April 1, 2004.

Top 30 Campaign

Initial contact has been made with all 30 schools. Prospective packets have been sent and there will be follow up contact with the schools.

Building Blocks for APPA Growth

The APPA Membership Committee, APPA Member Services department, and the APPA Membership marketing team helped develop a grassroots e-manual focusing on membership recruitment and development issues, as well as on chapter development (organizational structure, meetings, advocacy, planning, governance, etc.). It can be accessed via the APPA website at <http://appa.files.associationdirector.com/BldBlock/BUILDBLX.pdf>.

A membership recruitment kit was also developed and is available to help members recruit other members.

Regions and local and state chapters should take advantage of these tools and resources.

Looking forward

The next few years will be pivotal for APPA. Our strength as an association starts with having a solid institutional membership base. We must now develop programs to encourage the regions, chapters, and individuals within them to embrace the grassroots concept for recruitment, retention, and diversity using the tools that have been mentioned above.

As well, it is vitally important that APPA review its services and governance structure to ensure that we will continue to meet the needs and expectations of a rapidly changing membership demographic. To that end, the Membership Committee will play a key role in researching, evaluating, and recommending how our services should evolve to ensure that we

continue to meet the needs of our members into the foreseeable future.

The Board of Directors' meeting minutes provide further information on APPA activities during the past fiscal year and can be found at www.appa.org/leadership/board/minutesmain.cfm.

Vice President for Educational Programs

Sam L. Polk Sr.

It is somewhat hard to believe that this July will mark the first year of my term as vice president.

APPA's goal to provide unmatched educational offerings remains a high priority on my platform. What a challenging and rewarding year of great programming accomplishments. Much of the credit goes to the hard work of the Education



Committee members who have demonstrated great drive and commitment that is needed to produce and monitor the quality of programming that APPA provides to its members. I feel honored and blessed to work with a great committee: Anita Bailey, ERAPPA; David Gray, SRAPPA; Ralph Zia, MAPPA; Pat Apel, CAPP; Polly Pinney, RMA; Mark Hunter, PCAPP; Jay Klingel, Institute Chair; Doug Christensen, Leadership Academy Chair; Suzanne Healy, director of meetings, conventions, and education, and Xenia Murphy, meetings assistant.

2005 Educational Facilities Leadership Forum

As this report is submitted, we are still nearly three months out from the Forum, which will be held August 4-6 in Orlando. The Education Committee

has worked very hard to re-position the program offerings so that we truly meet the needs of the members. We are holding our breath as we see your reactions to a meeting unlike any we have offered to date. Programming selections that will put the knowledge that APPA members need today right in their hands. Let's not forget our Strategic Business Partners and other Business Partners who continue to support APPA activities with their generous sponsorships. Thanks to all our exhibitors who make the Hall of Resources a place to learn about products and services for facilities professionals.

2006 Joint APPA, NACUBO, SCUP Meeting

This meeting continues to move forward; APPA staff that is involved in this massive project forges ahead with much work and much success. I am grateful for the work of APPA's representatives on the Program Advisory Committee: Gary Reynolds, Rod Rose, Maggie Kinnaman, and Jack Colby, as well as individuals who have just completed their first rounds as program reviewers. The first call for papers for the 2006 meeting has just been completed, with many outstanding presentations submitted. We encourage you to participate in the next round for calls, which will start in August. There will be several areas at the Orlando Forum where you will be able to obtain information on the 2006 meeting in Honolulu.

I am truly amazed with the tremendous work that has gone into the 2006 meeting from its earliest stages. The potential importance of the collaboration between these three associations goes beyond what any of us thought it might. Let me tell you that to miss this meeting will be a terrible injustice to you and your university.

Institute for Facilities Management

As APPA's premier educational offering, the Institute continues to provide a solid professional development tool to the membership. This September's session will take place in Norfolk, Virginia, and will offer a session of Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision. Additionally, in an effort to continue to cross market with our other educational programs, Track I of the Leadership Academy will also be offered.

A special thanks to Jay Klingel, Mary Vosevich, Cheryl Gomez, and Don Guckert as they continue to assist us on providing the material that provides the APPA membership with the professional development tools they need. Additionally, they are responsible for the continued high caliber of the Institute faculty. For this I am personally grateful.

Supervisor's Toolkit: Nuts and Bolts of Supervision

Once again, the Supervisor's Toolkit training program will be offered alongside the Institute program this September in Norfolk. We continue to receive outstanding feedback from this program.

Many thanks to those regions who have truly taken this program and ran with it. As I am updated by the staff, I am so pleased to hear of the many schools and regions taking advantage of this outstanding program.

I would also like to thank the group of dedicated individuals who never cease to amaze me on how they are constantly checking and re-checking the material of the program to make sure it is all it needs to be. To Wally Glasscock, Nancy Yeroshevsky, Carol Trexler, and Michelle Estep, thank you for bringing a much needed offering to our front-line supervisors within APPA.

Leadership Academy

This past June marked the first offering of the newly designed Leadership Academy. Many of you know that in October 2004 the advisory group responsible for the delivery of the Academy came together to evaluate the current program and see how it may better align with the needs of our membership. What has come to be is a program that will truly answer the needs of all individuals at the many stages of leadership. The newly designed program will offer content area in individual effectiveness skills, interpersonal effectiveness skill, managerial effectiveness skills, and organizational effectiveness skills.

I would like to once again thank the members of the group: Doug Christensen, Bill Daigneau, Ann Jenkins, James Cole, David Judge, Gary Reynolds, and the late Charlie Jenkins. It is with a heavy heart that we deliver this year's Academy without Charlie, but I know he will be pulling for great success to us all.

As I begin the start of the second year of my term, I look forward to being part of the many successes within APPA's educational programming family. We hope that with your help we will continue to answer the needs of the facilities professionals around the world.

Vice President for Information and Research

Michael J. Sofield

It has been another busy year for the Information and Research Committee. From the Forum of 2004 through the end of December, the committee worked off line and collectively via twice



monthly conference calls to finish the development and testing of the new Facilities Core Data Survey. When the survey instrument launched in January 2005, we found that our work was far from over. Committee members fielded questions and comments from the members in their regions and assisted Laura Long (LTL Collaborative, APPA's

survey consultant) and the computer programmers to patch, debug, and otherwise smooth out the process for the more than 200 member institutions who responded to the call. Work has continued in small groups to prepare for a presentation scheduled for the 2005 Educational Facilities Leadership

Continued on page 17

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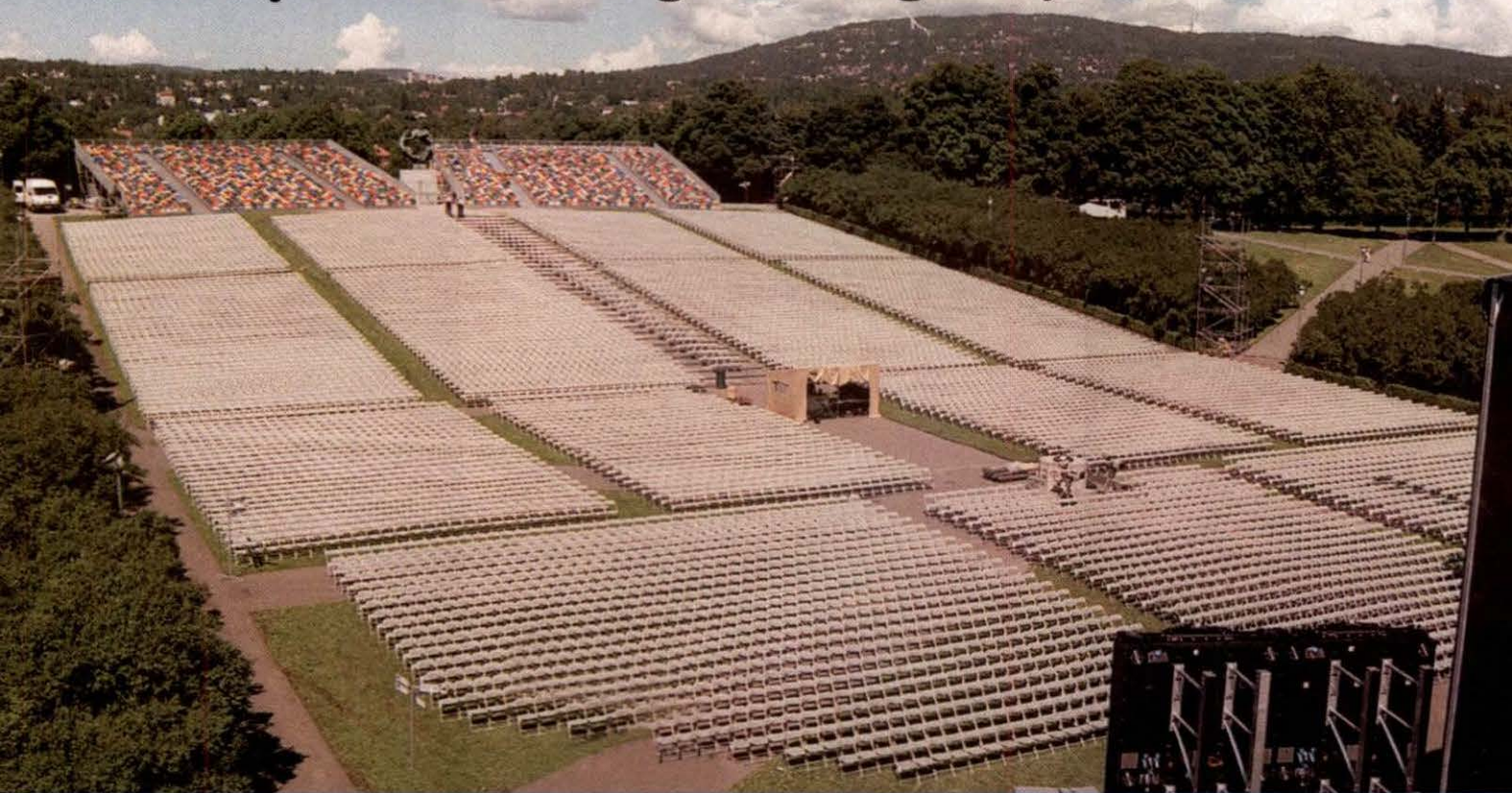
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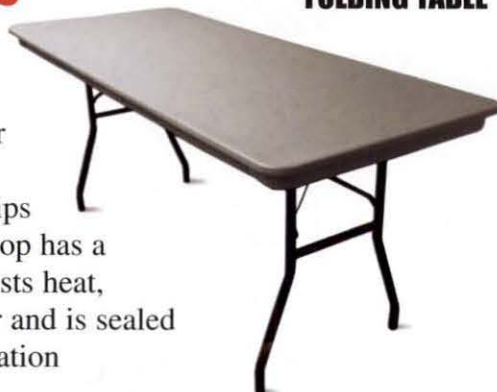
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Forum in Orlando. Another group is busy working with Steve Glazner and Laura Long on the 1st edition of *Facilities Performance Indicators* in both print and CD versions. The CD will be searchable and promises to be a must-have report for all institutions. Finally, the continuous process improvement process is underway under the watchful eye of Past President and At-Large Member of the I&R Committee, Maggie Kinnaman. This group is mining the data and responses from the survey's customer service module. The results of this work will allow APPA to improve the survey instrument, add and delete questions as needed, and continue to make this a relevant part of your business plans. Watch for this annual survey to open late this fall. If you participated in the current survey, your data will pre-populate the screens and you need only update those areas that changed during the year. What a benefit to not have to start from scratch each year!

Publications

APPA continues to pursue an aggressive publications agenda. *Facilities Manager* magazine, published six times per year, remains a leader in our industry and has attracted a vibrant advertising base along with a wide variety of feature articles. This year 18 articles were eligible for the Rex Dillow Award for Outstanding Article; one will be awarded this honor at the Awards Breakfast during the Forum in Orlando. In addition, thirty-six authors contributed an article to the magazine for the first time.

The magazine has been supplemented with a twice-monthly electronic newsletter. *Inside APPA* contains breaking news and information to keep the membership current on changes in our profession as well as providing a regular channel for news and other information. As we

approach the Forum, APPA staff will keep us up-to-date on plans and schedules via *Inside the Forum*, an additional e-newsletter.

Publications released during the past year include:

- *Creating a Service Culture: Making the Customer Connection*

Publications currently in development for future release include:

- *Facilities Performance Indicators (CD and book)*
- *Facilities Reinvestment*

Along with these two publications, plans are underway for a monograph on planning, design, and construction, a book on leadership in facilities management, space planning, and shared services.

The I&R Committee has held preliminary discussions on the next major publications initiative, updating *Facilities Management: A Manual for Plant Administration*. Our first step will be to identify potential editors for each volume as well as identifying four editorial review panels from within the committee. A schedule will be established with the goal of completing one volume per year as well as a long-term plan to keep the manual current well into the future.

Website and Technology

During the past year APPA appointed Maxine Mauldin to Information Services Manager. She has been busy working behind the scenes to install new association management software systems that will enhance future website development and promote e-commerce initiatives sought by our members. Maxine's background in member services makes her uniquely qualified to lead this effort. Each APPA member has been provided with a unique member number and a change-

able password. This will allow everyone to register online for APPA program offerings, purchase publications, and ultimately, to customize your view of APPA's website. Last, but not least, a print page option is now available on the website. Thank you Vickie Younger, for promoting this need as you passed the baton last summer!

Center for Facilities Research (CFaR)

CFaR has made great strides in the past year and is beginning to produce outstanding studies and reference material for your use. Four members will be recognized at the Forum for completing and publishing their research work. This year we will also see the fruit of our new student chapter research program. Students from Brigham Young University will present their research on recruitment and retention of facilities professionals to the CFaR Advisory Committee as well as at the Facilities Lab in Orlando. We should all be extremely proud of the next generation of facilities professionals and their interest in making APPA their association of choice!

CFaR is also proud to announce the appointment of Scott Turley (CAPP and the University of Arkansas) as the new CFaR Assistant Director for Energy and Utilities. The CFaR Advisory Committee has also welcomed Jeff Campbell (BYU Student Chapter Advisor) as its newest member. Congratulations to both Scott and Jeff!

Several major research projects are moving close to completion and one would not have survived without your help. Many thanks to the many members who willingly went to bat and helped promote the student survey on their campuses. Over 16,000 students from 46 institutions responded to the online survey. Results from this survey will provide meaningful answers to questions surrounding the recruitment

and retention of students to their particular college or university. Look for the full results to be announced later this year.

Final Notes

A year ago I was the newly elected Vice President for Information and Research and found a vibrant, hard-

working committee that was focused on getting the new Core Data Survey out and into the member's hands. Congratulations and thanks to this hard-working group. They did it and then did some more! Please take a moment when you see them and add your thanks to mine, for they exemplify the best of APPA. With my sincere thanks

and gratitude to: Jerry Hill, ERAPPA; Randolph Hare, SRAPPA; Fred Plant, MAPPA; Scott Turley, CAPPa; Harvey Chace, RMA; Debbie Aguilar, PCAPPA; Maggie Kinnaman, At-Large; Betsy Colgan, director of communications; and Steve Glazner, director of knowledge management and staff liaison to the Information and Research Committee.

Vice President for Professional Affairs

Alan S. Bigger

First of all, thank you to the APPA membership for affording me the opportunity to be of service to APPA and the profession during the past year and for the honor to serve APPA for two more years. There is much to learn about APPA and it seems that the year has just flown by and



another annual report is due. APPA would be nothing without its members nor would it be able to accomplish its missions without the dedication and professionalism of the team in the APPA office. Thank you, members of APPA and the APPA office for your support during the past year. We also owe a debt of gratitude to the Professional Affairs Committee (PAC) members Joseph P. Rubertone, ERAPPA; Jodie Sweat, SRAPPA; Greg Fichter, MAPPA; Bob Hutton, CAPPa; Dave Button, RMA; Dan Johnson, PCAPPA; and David Cain, At-Large, and to the Awards and Recognition Committee (A&R) members Dennis Bohlayer, ERAPPA; Ron Brooks, SRAPPA; Gary Shumaker, MAPPA; David Gronquist, CAPPa; George Stumpf, RMA; and Tony Ichsan, PCAPPA, for their willingness to serve



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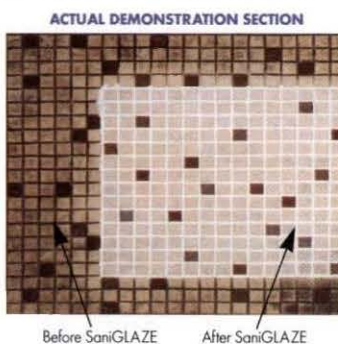
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APPA, the membership, and to give up their weekends to attend APPA meetings.

Goals for Professional Affairs

- Research and develop strategic partnerships (PAC)
- Continue to educate members in the field of code advocacy (PAC)
- Increase participation and diversity in the awards process (PAC and A&R)
- Enhance the effectiveness of on-line submissions for all award programs (PAC and A&R)
- Review award nominations and make recommendations for awards (PAC and A&R)
- Participate in a comprehensive review of the credentialing process
- Concentrate on "what's in it for me" in APPA and tailor awards to meet the needs of the membership
- Increase awareness of generational differences in the awards process

Progress toward these Goals

Develop Strategic Partnerships

During the year, APPA and PAC have concentrated on fleshing out partnerships with the American Society for Healthcare Engineering (ASHE) and the International Sanitary Supply Association (ISSA). The APPA Board continually reviews the strategic partnerships for relevance and applicability to the membership in the ever changing facilities profession. The partnerships with ASHE and ISSA are translating into real benefits for APPA members. ASHE members made presentations at the 2004 Forum in Washington, D.C., and will do so again this year in Orlando. Along with sponsoring a speaker in Orlando, ISSA also hosted Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision at their international trade show in New Orleans last November, and will host

the program again in Las Vegas in October 2005. APPA also provided leadership training to the ASHE membership at their conference in July 2004, and will do so again this year. ISSA and APPA have been evaluating the possibilities of a research project that would address the impact of custodial operations on the educational process and have also been exploring the exchange of publications in their bookstores and access to online ordering.

Another strategic partnership that flourished during the year was with the EPA's College and University Sector Initiatives Coordinating Committee with three work groups (regulatory, environmental management systems, and performance measures) in an attempt to modify the hazardous materials regulatory compliance language.

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Code Advocacy

Thanks to the direction and mentoring of Brooks Baker, past president of APPA, code advocacy is now becoming an integrated component of many APPA programs. Each edition of *Facilities Manager* has an article that addresses some aspect of codes in a column titled "Code Talkers," and code advocacy sessions are now part of the educational programs offered at the Forum.

Increase Participation in the Award Process

APPA awards offer individual members and member institutions a variety of ways in which to be recognized by their peers. A tangible element of APPA's programs, the awards address specifically the real benefits of membership in APPA. However, the awards need to be generated by the membership and in a timely manner. The dead-

line for submission for the 2006 awards is January 31, 2006.

The awards process addresses individual awards as well as institutional awards. The quality, quantity, and diversity of applications increased this year and the competition was quite fierce. The members of PAC and ARC had their jobs cut out for them as they met to determine the persons and institutions that would be recognized this year. PAC was faced with the daunting challenge of evaluating 26 submissions for the Effective and Innovative Practices Award and two submissions for the Award for Excellence. ARC reviewed the nominations for Pacesetter Award (11 submissions), Meritorious Service Award (seven submissions), and APPA Fellow (two submissions). All awards will be presented during the Forum in Orlando.

Online Submission

The vast majority of awards for 2005 were received online and we encourage you to submit them online for 2006. Make sure to follow the directions carefully; if you have questions, please call the APPA office for assistance. Also, your regional representative on the PAC and A&R Committees is a resource for helping you apply for an award—please contact them as they can guide you through the application process.

Award Process

Submissions were completed and all nominations were reviewed by the PAC and A&R Committees by May 2005. The following are the award recipients, by category, for 2005:

Award for Excellence

University of Florida (SRAPPA)

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Effective and Innovative Practices

University of British Columbia (PCAPPA)
University of Hartford (ERAPPA)
University of Iowa (MAPPA)
University of Miami (SRAPPA)
University of Victoria (PCAPPA)

Pacesetter Award

Anita Bailey (ERAPPA)
David Brixen (RMA)
Harvey Chace (RMA)
Darrel Meyer (CAPPA)
Fred Plant (MAPPA)
Jewell Winn (SRAPPA)

Meritorious Service Award

Philip L. Cox (ERAPPA)
Vickie D. Younger (CAPPA)

APPA Fellow

Edward D. Rice (CAPPA)

Credentialing, "What is in it for me," and Generational Differences

These three goals tend to mesh together as they all address the issue of the value of membership in APPA for the individual member. In 2003, APPA commissioned a study titled "Professional Certification Program Needs Assessment Survey Report" to review the possibility of a certification or credentialing process. At that time, based upon the response of the membership, it was decided that the timing was not appropriate to move ahead.

During the past year, Ed Rice, APPA president, has encouraged committees to address the "what is in it for me" aspect of membership. It is increasingly apparent that the membership of APPA is changing and that generational differences need to be addressed in the awards process and throughout every aspect of APPA. Jack Colby, president-elect, stressed this to the APPA Executive Committee, PAC, and A&R. Jack has recommended that a working group evaluate generational issues and how those issues impact the possible need a credentialing program within APPA. This working group would make recommendations to PAC and the APPA Board in the near future.

It would seem that addressing these three issues in an effective and meaningful manner will have a direct and long-range impact upon the growth and membership of APPA.



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Executive Vice President's Report

E. Lander Medlin

Although the economic picture may be improving in relative terms as compared to the past three years, the political controversy and economic tensions surrounding higher education and K-12 schools remain extraordinarily troubling. This is especially true for our public institutions mired in continuously escalating state entitlement program obligations. The budget prospect for major areas of federal support vital to our colleges and universities is equally tough. Medicare, healthcare, and retirement funding are eating away at investments in basic and applied research, and the need for cuts to the discretionary areas of the federal budget looms high. Fund-raising activities from philanthropic giving and equity investments in the stock market also remain somewhat unsteady and volatile.

As the perfect storm of ever-increasing enrollments and continuously declining state and federal appropriations continues to close in, it is clear that stormy budgeting weather is in our future. Significant state and federal support cannot be relied upon to solve the funding challenges facing higher education. However, despite all these challenges, most of the world's citizenry value the work of colleges and universities and their education systems as a whole and correctly understand the economic and social benefits that a good education delivers to its youth. Although overall public perception is positive, it is their financial support that is desperately needed.

Fortunately, APPA continues to receive wonderful support through

active individual member involvement and participation and from its member institutions and business partners. As such, APPA remains the "association of choice" in providing the educational facilities professional with its training and development needs and requirements. One measure of that support is our financial stability. Our diverse port-

folio of programs, products, and services continues to serve us well. We are pleased to report a year-end surplus of \$78,482. A large portion of these monies have been placed in our operating and building reserves funds representing 75 percent of our long-term, Board-directed cash reserves goal. We are also pleased to report that most



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categories of our conservative, yet focused, budget achieved or exceeded the budgeted targets set for revenue generation and expense minimization. Nevertheless, the Board and the staff have a sharp eye on the future and have established another lean budget for the coming year.

The fragile financial state at our educational institutions and, correspondingly within the facilities departments, weighs heavily on our minds and remains an important factor in our decision making.

Our strategic plan remains a valuable and viable resource providing consistent and predictable guidance, direction, and focus during these turbulent times. We continue to make significant strides in achieving the desired outcomes of the strategic

plan: competency, collaboration, and credibility.

Competency

The guidelines and standards established by your colleagues over the past several years remain invaluable tools for resource allocation and strategic planning. If your resource library does not include the new 2003-04 *Facilities Performance Indicators* book and CD-ROM, the trilogy of staffing guidelines for the custodial, trades, and grounds areas, and the customer service book titled *Creating A Service Culture: Making the Customer Connection*, you should quickly ensure that it does. In addition, I highly recommend the previous titles of *Planning and Managing the Campus Facilities Portfolio*, the *Building Commissioning Handbook*, second edition, and the monograph

Field Notes by James Christenson.

Further, the availability and flow of relevant information regularly occurs via APPA's bimonthly magazine, *Facilities Manager*; *Inside APPA*, our biweekly electronic newsletter; our website, www.appa.org; and the APPAinfo list that boasts over 1,000 subscribers.

CFaR, APPA's Center for Facilities Research, is also resident on our website and fills a vital need by integrating the development, collection, and delivery of research in the education environment. Active participation in and involvement through CFaR by facilities professionals, allied associations and agencies, and other education community stakeholders is increasing the quality and quantity of credible data and information you need to make



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knowledgeable and informed decisions for your institutions. CFaR is designed to be a repository of educational facilities-related information. The research collected and sponsored by CFaR will provide compelling information to a number of key constituencies and educational stakeholders.

Eight research projects are presently underway this year. In addition, APPA is sponsoring two of its own major research projects. The first is "Building the Environment Through Strategic Investment" and is intended to demonstrate the importance of integrated resource planning and management for both capital development and renewal/maintenance of all facilities. The resulting model or guidelines should stimulate good decision making around capital development and maintenance/renewal by senior institutional officers.

In addition, we sponsored an institutional survey, "The Impact of Facilities on Student Recruitment and Retention." Nearly 50 institutions responded to the call, ultimately garnering more than 16,000 student responses to the survey. The data is now being analyzed with the results ready for a news release this fall.

The content and appeal of APPA's vast array of educational programs (Institute for Facilities Management, Leadership Academy, Educational Facilities Leadership Forum, and the newest offering of Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision) continue to provide members with the professional and personal growth and development needed to compete and collaborate effectively in today's environment. And, to meet your continuing education/ licensure requirements, look for the CEUs and PDHs that are now being offered for many of our courses and programs.

Supervisor's Toolkit—a basic supervisory training program—specifically focuses on training for front-line

supervisors in the trades, custodial, grounds, and other general services areas of responsibility. It is being offered internationally and can be delivered at your own institution or in collaboration with your region. To date, the program has been delivered 30 times across the United States and Canada (from St. John's, Newfoundland to San Jose, California). Furthermore, interested individuals and/or trainers on your campus are welcome to take this course and explore the possibility of becoming qualified to deliver the program regularly at your time and place of choice.

Collaboration

Increased collaboration and partnering continues to occur on a number of fronts and increases the depth and breadth of information and ultimately the value you receive as part of your membership.

Our latest association strategic alliances have expanded the collaborative opportunities available to you. The American Society for Healthcare Engineering (ASHE) has been assisting APPA in its effort to focus more comprehensively on a code advocacy program, and APPA is assisting ASHE with its effort to focus on the delivery of supervisory, managerial, and leadership educational programming. As a result, a new "Code Talkers" column now appears in *Facilities Manager* magazine along with scheduled educational sessions at the Forum. The International Sanitary Supply Association (ISSA) is collaborating with APPA to develop substantive research for benchmarking data in the custodial arena. ISSA also continues to deliver the Supervisor's Toolkit program at its industry show each fall.

There is a great deal of "buzz" across the entire higher education community around our 2006 Forum since it is a joint conference being collaboratively planned with NACUBO (National

Association of College & University Business Officers) and SCUP (Society for College & University Planning) in Honolulu, Hawaii, July 8-11, 2006 and will offer a seminal educational program. The theme of the conference is "The Campus of the Future: A Meeting of the Minds." Visit our joint website (<http://www.campusofthefuture.org>) for more details and complete information on how you can reap the benefits of this incredible educational opportunity. This is indeed a unique collaborative event you won't want to miss. This certainly represents the ultimate opportunity in collaboration and partnering!

These strategic alliances and partnerships help APPA leverage its resources to provide cost-effective, focused research, information, and educational programming, and at the same time, ensure an increased information flow to its members.

Credibility

Environmental issues and compliance concerns remain an important part of our public policy agenda. APPA is one of six organizational members of the EPA College & University Sector Initiative that is focused on reforming the hazardous materials regulations and establishing better environmental performance measures and systems. This alliance consists of the ACE (American Council on Education), NACUBO, CSHEMA (Campus Safety, Health, and Environmental Management Association, a division of the National Safety Council), HHMI (Howard Hughes Medical Institute), and C2E2 (Campus Consortium for Environmental Excellence) and continues to drive our efforts to create and maintain a substantive dialogue with the EPA. Significant progress is being made regarding regulatory change in hazardous materials/waste compliance. This effort is both notable and noteworthy in our quest for a meaningful and substantive dialogue with EPA.

Visit our website for updates on progress and a link to this EPA initiative and the associated compliance assistance center.

I cannot emphasize enough the importance of APPA's primary role to increase the awareness of the facilities profession with senior institutional officers. The challenges we face well

into the future will require our best collective efforts and will be key in helping to shape the thinking about these issues and the contributions we can make to their long-term resolution.

I firmly believe that our competitive advantage in this rapidly changing and challenging world is the fact that you

continue to choose to remain members of APPA, actively engage in our programs, and faithfully utilize our products and services. These are difficult and trying economic times. The decisions you face and the priorities you make must be strategic.

Therefore, we appreciate the value you place on your membership in APPA and in our training and development programs and publications. Our efforts to focus on the grassroots of this organization will continue in the coming year to ensure that your needs and expectations are being heard and ultimately met. I truly believe that it is through the vast array of educational offerings, print and electronic information, and publications that APPA can help you gain that competitive edge and enhance your professional image.

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¹Software developed in consultation with Jack Dudley, P.E., Editor and Co-Author of the First Edition of the *Custodial Staffing Guidelines* and Co-Author of the Second Edition. Mention of APPA does not imply endorsement of the product.

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Code Advocacy Dashboard

by Christopher K. Ahoy and David Ballard

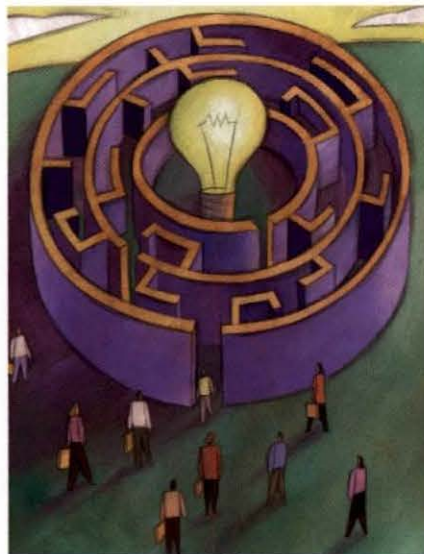
By using Baldrige criteria and Balanced Scorecard Plus, facilities planning and management organizations can develop a systematic and integrated approach of identifying laws, codes, and regulations applicable to each business unit and can assess each unit's regulatory compliance journey through a dashboard system. The dashboard format allows each business unit to input and track the progress of both individuals and work units and displays organizational results on a primary dashboard for senior leaders to review on an interactive basis.

The purpose of this article is to generate an in-depth understanding of a Code Advocacy Dashboard program. It does this by showing how an enterprise can become excellent in the area of regulatory compliance, while tracking the capabilities of their employees and the organization to respond to threats and challenges.

Dashboard Goals

Build. The intent of the Code Advocacy Dashboard is to build a team organization with camaraderie and high performance goals. This team is built to last with the shared values of competency, creativity, credibility, collaboration, and quality communication and an understanding of the concepts of code requirements.

Clarify. In order to clarify the definitions of what an effective organization really is and what it means to



have operational excellence in promoting awareness, high-level relationship building, process focus, operational excellence, and most importantly, people focus are needed to create "knowledge-based workers" of the 21st century. These knowledge-based workers will have a Code Advocacy Dashboard as one of the tools to achieve success in meeting the ever-changing needs of regulatory compliance.

Share. The purpose of this dashboard is to promote understanding of the cross-functional work units. Using Code Advocacy Dashboards raises the bar for facilities personnel to move toward a shared vision in support of each of their institutions' competency in code compliance.

Promote. Promoting Code Advocacy Dashboards through interdepartmental, cross-functional, process management effectiveness and cross-functional relationships helps to ensure greater continuity of collaboration through high-level anticipatory communications.

Engage. Through benchmarking, lessons are shared with like-minded professionals throughout various

APPA regions and others within the industry boundaries.

Regulatory Compliance

The Baldrige business performance assessment tool asks two basic, but difficult to answer, questions in regard to organizational regulatory compliance.

1. What is the regulatory environment under which your organization operates?
2. What are the applicable occupational health and safety regulations; accreditation, certification, or registration requirements; relevant industry standards; and environmental, financial, and product regulations?

The Balanced Scorecard Plus requires "Metrics," and "Measuring What Matters." Both criteria ask the following question: *What are your RESULTS for KEY MEASURES or INDICATORS of regulatory and legal compliance?*

All educational facilities administrators must ask these important questions. An error or omission in the realm of regulatory compliance can result in hurting or harming people, property, and the environment, as well as significant fines, litigation, loss of organizational credibility, and damaged reputations. However, the overriding question remains, "What laws, codes, regulations, and recognized standards of care apply to each service unit within a modern facilities organization and are they compliant?" To answer these questions, the Code Advocacy Dashboard was created.

Facilities planning and management organizations can respond to these issues by establishing and deploying a systematic and integrated process to identify and deploy actions necessary to ensure compliance with

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Dave Ballard is safety and training coordinator at Iowa State University and can be reached at dballard@iastate.edu.

key regulatory requirements through a system of layered dashboards. The entire system is based on the Plan-Do-Check-Evaluate cycle, a Baldrige business performance assessment tool. The Code Advocacy Dashboard is designed to:

- Provide each business unit with a systematic process of achieving and maintaining regulatory compliance through online benchmarks and self-audits.
- Allow the knowledge-based worker at the process, operational, and business level to find the status of Code Advocacy Dashboard information in order to make informed decisions.
- Allow senior leaders to evaluate progress toward compliance of applicable laws and regulations at organizational-wide and business-unit levels.

The conceptual model for this system is shown in Figures 1 and 2.

Figure 1 shows the system as a process map, and Figure 2 illustrates dashboards generated by the system. At the heart of the system is a two-dimensional matrix, with popup informational screens linked to promulgating organization-specific screens that list all applicable laws, codes, regulations, and standards promulgating organizations. (Refer to Figure 3 for a listing of all promulgating agencies/organizations applicable to a typical facilities planning and management organizations. This is not a complete list, but is a start in looking at various codes that apply in the business of facilities planning and management.)

The system is designed to be user friendly. Upon entering the online system, users are directed to the Organizational Dashboard (refer to Screen 1 on Figure 2). The purpose of the Organizational Dashboard is to show the big picture by identifying all applicable regulatory agencies and business units within the facilities planning and management organization as color coded fields. The Organizational Dashboard also allows users to review the mission of each regulating authority on a popup screen.

From the Organizational Dashboard business unit users are able to select any specific regulating agency for self-auditing. On this action, the user is directed to the business unit's Regulating Agency Dashboard (refer to Screen 2 on Figure 2). On Screen 2, users can identify regulations promulgated by a specific regulating agency. Plain English descriptions of the scope and application of each regulation are provided through popup screens. The

Regulating Agency Dashboard communicates regulatory compliance status by colored fields.

The Regulating Agency Dashboard also allows users to identify specific regulations applicable to their business unit for review and self-auditing (refer to Screen 3 on Figure 2). For compliance self-auditing, key requirements of each regulation are stated in plain English Yes/No questions. If the

Continued on page 32

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Figure 1. - Regulatory Compliance Performance Process Map

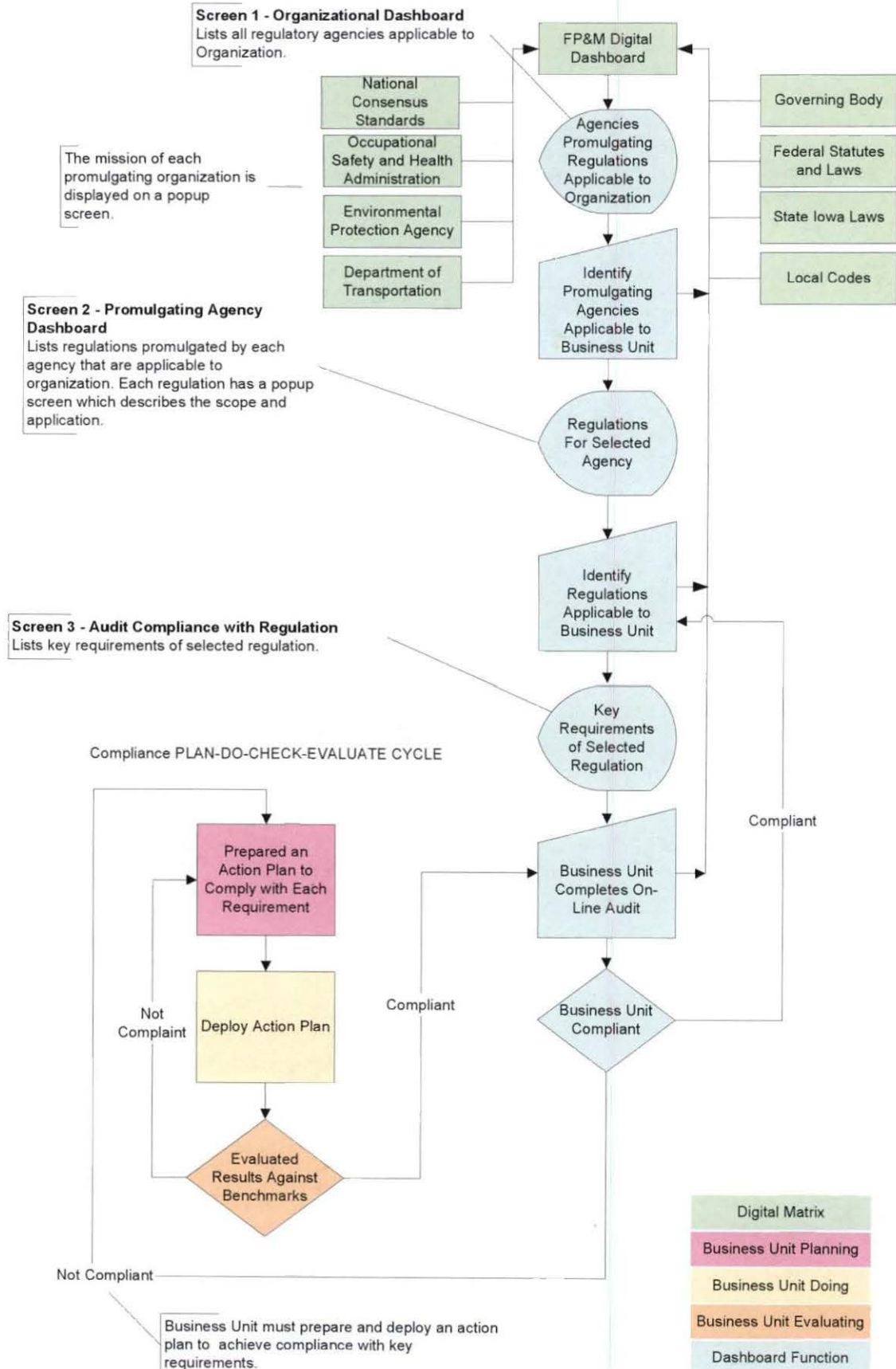


Figure 2. Layered Dashboards

Screen I - Dashboard

Regulations/Standards	Facilities Services				
	Building Maintenance	Campus Services	Custodial Services	Maintenance Support	Project Support
Occupational Safety and Health Administration		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Protection Agency		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NFPA Standards		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department of Transportation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local Codes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Popup Screen

Mission is to protect health and safety of employees in the workplace. Applies to all business units.

Screen 2 – OSHA Audit

Popup Screen

Applies to business unit if hazardous chemical are present in the workplace.

OSHA Regulation	Applies To Service	
Hazard Communication	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
Control of Hazardous Energies (Lockout/Tagout)	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
Hearing Conservation	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N

Screen 3 – HAZCOM Audit

Key HAZCOM Requirements	Compliant	
List of Hazardous Chemicals Prepared and Available to Employees	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
MSDS Available for all Hazardous Chemicals and Available to Employees	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
All Chemical Containers Labeled	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
Employees Have Received Information and Training	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
Written Hazard Communication Prepared and Available to Employees	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N

Return to Screen 2 – OSHA Audit

OSHA Regulation	Applies To Operation	
Hazard Communication	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
Control of Hazardous Energies (Lockout/Tagout)	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N
Hearing Conservation	<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N

If all key requirements are deployed, the field turns green to indicate compliance with selected regulation.

Return to Screen I - Dashboard

Occupational Safety and Health Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Protection Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If all key OSHA requirements are deployed, the field turns green to indicate compliance applicable regulations.

Continued from page 29

business unit is in compliance with the regulation, the regulation field on Screen 2 turns green, and the user can select the next applicable regulation for self-auditing. If the business unit is not compliant, the user is directed to establish and deploy an action plan to achieve compliance. (Refer to the business unit Plan-Do-Check-Evaluate Cycle on Figure 1.)

The cycle of self-auditing and action plan deployment continues until the business unit is compliant with all regulations promulgated by a specific agency/organization. At that point, the promulgating organization field on Screen 1 turns green, and the user moves on to the next applicable promulgating agency/organization for self-auditing.

Benefits of Using the Code Advocacy Dashboard

- Gives the individual perspective relative to the organization's dashboard metrics of various code compliance.

- Gives the employees of the organization perspective about code compliance relative to the organization.
- Gives the organization's perspective relative to code requirements.
- Provides a proactive approach to risk management and saves the institution from negative assessment and potential fines.
- Provides a proactive approach to health, fire, and life-safety of the employees and those they serve at the institution where they work.

Conclusion

While Figures 1 and 2 illustrate only one area of focus and show only one example of the dashboard for the OSHA and HAZMAT compliance, this methodology can be repeated in other areas. Figure 3 shows applicable promulgating agencies and organizations, and additional lists can be manifested based upon local, state, or federal requirements.

Since each work unit is responsible for inputting and data mining from their respective areas, the applicable

code requirements shown on the dashboards are always up-to-date. These displays are easily accessible to anyone in the organization who wishes to check the status of code issues.

Whether at the business, operational, or process level, tracking code requirements and performance can now be easily accomplished with a point and click technology through organized creative technologies and will allow anyone in the organization to view and drill down to business unit levels. This information is invaluable for training and development purposes and also provides a snapshot of the organization relative to meeting or exceeding code requirements on a real-time basis. It also facilitates a systematic and integrated approach for identifying laws, codes, and regulations applicable to each business unit and assesses each unit's regulatory compliance journey through a dashboard system. 🏰

Figure 3. PROMULGATING AGENCIES AND ORGANIZATIONS APPLICABLE TO THE TYPICAL FACILITIES PLANNING AND MANAGEMENT ORGANIZATION OF ANY INSTITUTION

Federal/National

American National Standards Institute (ANSI)
ASME Pressure Vessel Standard
Centers for Disease Control and Prevention (CDC)
United States Department of Agriculture (USDA)
Department of Energy (DOE)
Department of Transportation (DOT)
Environmental Protection Agency (EPA)
Food and Drug Administration (FDA)

Health and Human Services (HHS)
International Building Code (IBC)
National Electric Code (NEC)
National Fire Protection Agency (NFPA)
National Institutes of Health (NIH)
Occupational Safety and Health Administration (OSHA)
Uniform Building Code (UBC)

State/Local

Department of Natural Resources (DNR)
Iowa Administrative Code (IAC)
Iowa Department of Public Health (DPH)
Iowa Occupational Safety and Health Administration (IOSHA)
State Fire Marshal

Source: Iowa State University Environment Health & Safety, 2005.



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Membership Matters

Creating Mutually Beneficial Relationships

by Randel Edwards

One of the primary reasons that people join associations is for networking. For some, “networking” conjures up negative images of forced superficial conversations, pushy people asking for favors (or a job), and business cards being exchanged at the speed of light. Those are distorted images of networking. Simply put, networking is cultivating relationships—an essential part of one’s professional career. Research indicates that the most successful people in industries are usually also the most polished at networking. In addition, a 1999¹ study indicated that two-thirds of people interviewed found their new jobs through networking. In the association world, networking not only increases your professional advancement possibilities, it also helps hone your skills, solve problems, receive encouragement, and gain friendships.

While not everyone feels equally comfortable or skillful at networking, individuals can learn to network more effectively. First, it is important to discard some misperceptions. Networking is **not** about badgering or manipulating others. It’s **not** about begging for information, a promotion, or a job. It’s **not** about whether you are introverted or extroverted. Networking is about shared interests and creating mutually beneficial relationships.

In his article “Seven Ways to Maximize the Value of Networking Meetings,”² author Bruce L. Katcher stresses the importance of networking



with the right attitude. If you attend meetings with the attitude of getting something rather than giving, you are bound to be disappointed. However, if you go with the attitude of helping others or with the goal of meeting one new person with whom to have a one-on-one conversation, you are more apt to be successful.

Some people might wonder, “How could I help others?” You can provide introductions; recommend books or websites; provide information about people, companies, or trends; or simply listen and offer emotional support.

To effectively network, individuals need to know themselves. What are your goals and interests? What do you want to know and whom do you want to know? Are you looking to expand your expertise and knowledge base in a certain content area? Do you have specific issues on your campus for which you are looking for solutions? Do you want to meet people who are currently functioning in the next position in your career path? Are you looking for a mentor? Is your goal to eventually move to another region, state, or province? The answers to

such questions will help give focus to your networking efforts and may also influence where, when, and with whom you network.

Part of self-awareness includes understanding your native inclinations toward networking. Sometimes introverted individuals feel as if they are disadvantaged when it comes to networking. Granted, it is generally easier for extroverts to initiate a conversation in person or on the phone; however, it does not necessarily mean they are the best at networking. Typically, introverts are quiet people who prefer to spend as much time in the company of their own thoughts and ideas as in the company of others. They are usually good listeners who absorb and reflect on what they hear. This can actually work to one’s advantage when networking since listening and asking good questions are an essential part of the process.

Good advance preparation can help all individuals network more effectively, especially reserved professionals. Offering counsel in an article for *CareerJournal*,³ Judy Rosemarin recommends several steps. First, acknowledge and address any aspects of networking that are barriers to you. You may need to meet with a trusted friend or family member and practice role-playing until you are comfortable. Second, create a plan and follow it. This is appropriate whether you are meeting people in person, calling them on the phone, or contacting them via e-mail. Third, contact people when your energy level is highest. If you are attending a morning meeting and are not a morning person, stop by the coffee service before beginning your networking or possibly wait until later in the meet-

Randel Edwards is APPA’s director of member services. He can be reached at randel@appa.org.

Continued on page 38

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With all relationships, good manners never go out of style. Good etiquette contributes positively to one's ability to network.

Continued from page 34

ing. Fourth, prepare in advance what you want to say and have a brief (less than 30 seconds) introduction ready. Develop some key talking points. If possible, conduct research on the people you are planning to meet or call. This way you avoid asking questions that you could answer yourself. Fifth, pace yourself. Networking takes energy so allow time to recharge.

Another important aspect of advance preparation involves the formulation of questions. Simple, open-ended questions such as, "What challenges is your institution (or organization) facing these days," or "How did you become involved in



that project?" can be a great way to initiate a conversation. Once the other person begins speaking, listen carefully and intensely. Don't focus on what you are going to say next.

With all relationships, good manners never go out of style. Good etiquette contributes positively to one's ability to network. The MIT Career Office offers the following advice when it comes to networking at meetings.

- Avoid talking too long—allow time to listen to what the other person has to say.
- Watch your body language.
- Smile.
- Extend a firm handshake.
- Make comfortable eye contact.
- Leave with the goal of meeting three people or with the names of three other individuals to contact.

If you are networking via e-mail, exercise the same good manners you would exhibit in person. There is a tendency, at times, for people's electronic communication to be more casual and informal. When communicating through e-mail, properly identify yourself and your organization and include your full name, title,

organization, and e-mail address. If someone referred you to an individual, identify that person as well. When contacting someone for the first time, you should address that person formally, as is done in good business. Behave courteously and professionally. Write simply, clearly, and intelligently. If you ask for information, be sensitive that you are imposing on the person and briefly explain why you need this information. If you want something, be prepared to offer something in return. Finally, be sure and thank any person who answers you whether you receive a satisfying response or not from them.

After meeting someone or contacting him or her via phone or e-mail, be sure and follow up. If a thank-you note is appropriate, send one promptly. Once a relationship is established, e-mail can provide a convenient way to maintain a steady, low-key interaction. Don't overdue it. Pay attention to see if your gestures or communications are being reciprocated. As part of your follow-up, take time to evaluate your interactions. What did you learn? What was effective? What next steps do you need to take? Some people choose to keep a journal of their networking. Keeping a record of your experiences can provide perspective, as well as protect you from forgetting contacts, important information, and salient lessons learned.

As a word of caution, don't limit yourself in your networking. In her article "Diversify Your Network To Reduce Career Risk,"⁴ Ronna Lichtenberg points out that one of the most common career traps is to spend all your time with people exactly like you. Diversify your network. Purposefully invest time with people of different backgrounds and cultures. Force



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yourself out of your own age range. One of the great advantages of older persons is the rich reservoir of life experiences they can offer. In the same way, younger individuals can offer the richness of their own life experiences, as well as sometimes an enthusiasm and idealism that more mature individuals may have lost.

Finally, networking is not about numbers and goals achieved. It is about the kinds of relationships that you are developing and the quality of those relationships. Done correctly, networking is not just a life skill but a natural, lifelong process. You will find yourself doing it effortlessly and spontaneously whether on the golf course, at a professional meeting, or on an airplane. In retrospect, you will realize that because of networking you have reaped countless rewards both personally and professionally.

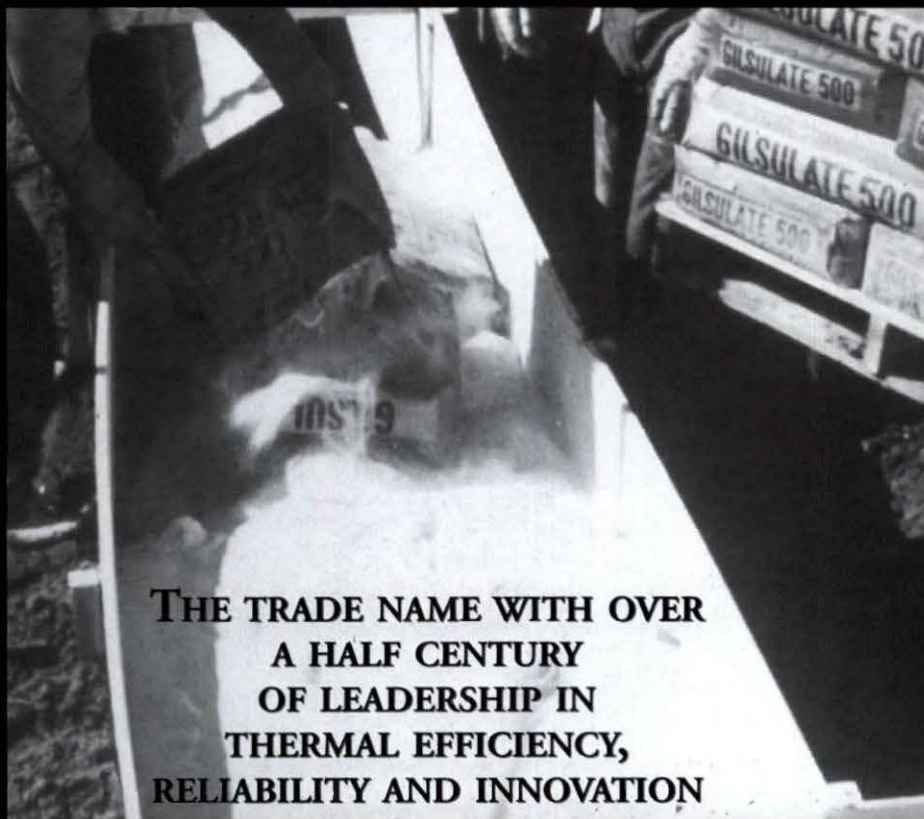
- Avoid talking too long—allow time to listen to what the other person has to say.
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- Extend a firm handshake.
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FACILITIES PERFORMANCE INDICATORS

FROM THE FACILITIES CORE DATA SURVEY

by Laura T. Long

APPA's new Facilities Core Data Survey had its debut in early 2005. The stimulating APPA survey website presented more options and tools than APPA has offered in the past and the reports being constructed from the new database have a fresh approach on how the information is displayed as well as offer new ranks of information.

APPA staff and the Information and Research Committee members were pleased (and relieved) when users encountered very few program problems for the first-time shakedown of the new survey site. However, one problem surfaced as a result of the new APPA institutional ID number assignments. The handshake between historical entry data and the user failed in about half of the cases but this will be fixed before the next round of Core Data surveying starts this fall.

A total of 203 institutions tested our new survey, which encompasses 12 data modules. The first of these is General

Data module that contains all of the usual overview questions about survey contacts and campus statistics. Once completed, it is used for all APPA surveys that are offered during that fiscal year.

After the General Data module is completed, the user can choose to participate in any number of survey modules in any sequence. There is the tried-and-true Operating Costs survey module that our facilities managers rely upon for gross operational measurements as well as the popular Personnel Data

Facilities Performance Indicators



and Costs survey module showing comparative salary and staffing information. Professionals interested in the more strategic planning measures can select the Strategic Financial Measures module and find out how their campus measures up in its maintenance of the campus physical assets.

Managers looking to benchmark their business practices can complete the Internal Processes, Innovation & Learning, and Customer Satisfaction survey modules along with the performance management self-evaluations. There is also a module for recording recommendations about the APPA Facilities Core Data Survey website.

Perhaps the biggest innovation on the Core Data survey website is its new instant report capability. Upon marking certain modules as "completed," the user is offered a preliminary

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report on their own data. For instance, when the Operating Costs module is marked completed, the user can print out a report showing their operating costs per gross square foot for Administration, Construction, Custodial Services, and other functional areas. There are a number of these reports, including one that computes a rough hourly rate for facilities functions based on the operating costs and FTE (full-time equivalent) staffing recorded in various survey modules.

These instant reports serve two purposes. The first is to give feedback to the persons entering data in a format that quickly shows questionable entries that might need to be corrected. For instance, the GSF and operating costs data points might look reasonable, but a cost/GSF may signal a problem that couldn't be seen by just looking at the data points. So, the first purpose is to allow the user to evaluate their information and give them an opportunity to make necessary corrections. The second purpose is to provide preliminary measurements that the facilities professional can use while waiting for the APPA finalized Core Data reports.

This year's participants from the United States, Canada, and one Australian campus are 10 two-year colleges, 35 four-year universities offering up to a Baccalaureate degree, 40 universities at the Master's level, 22 universities that have a limited number of Ph.D. programs, 56 universities with full Ph.D. and research programs, 12 campuses with specialized programs, and 28 K-12 schools, many of which are private.

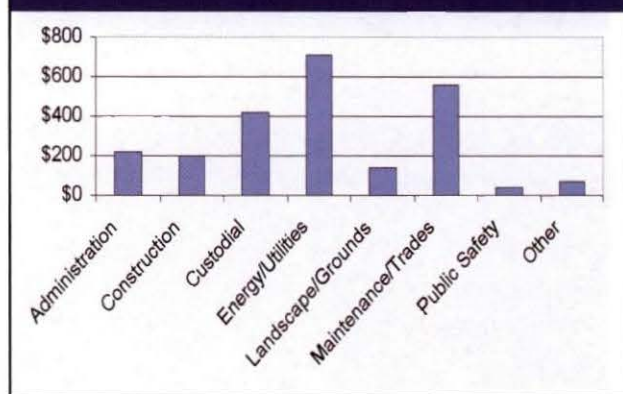
The Information and Research Committee members were delighted to have this varied mix of schools contributing statistical information to our membership. In addition to the many APPA member institutions that participated, we thank the staff and members of the Canadian Association of University Business Officers, the National Association of College and University Business Officers, and the National Business Officers Association for their support and marketing of the survey to a broader cross-section of educational institutions.

The survey reports (to be published in August as *Facilities Performance Indicators*) are not completed yet at press time, but we can share a few glimpses of what the information will show you. It will come as no surprise that operating costs have incrementally increased between 2002 and 2004. No

doubt there are a number of underlying causes of upward cost trends. One factor—labor costs—is demonstrated in the average salary historic bar charts. The chart below on Administrative salaries over the last ten years illustrates a consistent upward trend.

While we can't report on all the survey results in this short article, we would like to explore a new view of operating costs. One perspective that hasn't been explored by our APPA reports is how the cost of facilities operations relates to the campus student population. We understand that this is a "gross" measurement that doesn't filter out costs attributable to programs other than teaching. First we take a glimpse of the overall Core Data statistics reflecting the total survey population of K-12 schools through Doctoral/Research Extensive universities:

Facilities 2003-04 Operating Costs Overall Cost/Student



Facilities 2003-04

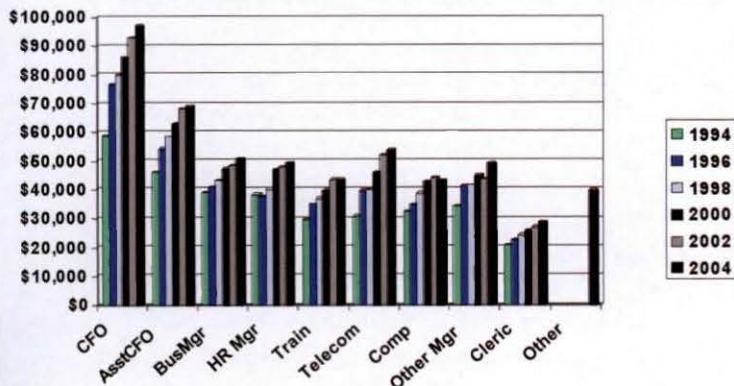
Operating Costs Overall Cost/Student Percent

Operating Costs	Overall Cost/Student	Percent
Administration	\$ 218	9.2%
Construction	\$ 203	8.6%
Custodial	\$ 420	17.8%
Energy/Utilities	\$ 712	30.1%
Landscape/Grounds	\$ 144	6.1%
Maintenance/Trades	\$ 558	23.6%
Public Safety	\$ 41	1.7%
Other	\$ 67	2.8%

Total	\$2,363	100.0%
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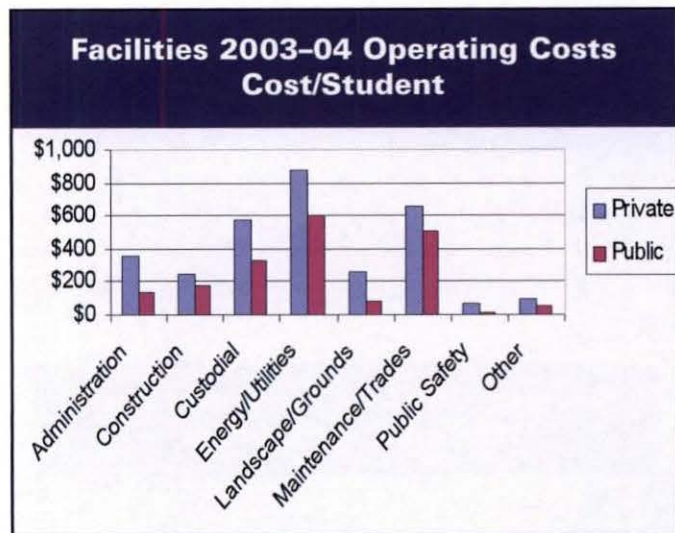
It might be surprising to realize that if all the facilities costs were to be burdened on students, the overall average cost would be \$2,363/year. One-third of that goes for heating/cooling buildings, providing water, electricity, and other energy/utilities functions. Nearly a quarter of the expense is incurred in maintenance and 17 percent in custodial services. The remaining 30 percent of costs is divided among facilities

Average Annual Salaries Administration



administration, managing the construction program, landscaping and grounds maintenance, public safety, and other tasks.

Here is a view of facilities costs/student between private and public institutions:

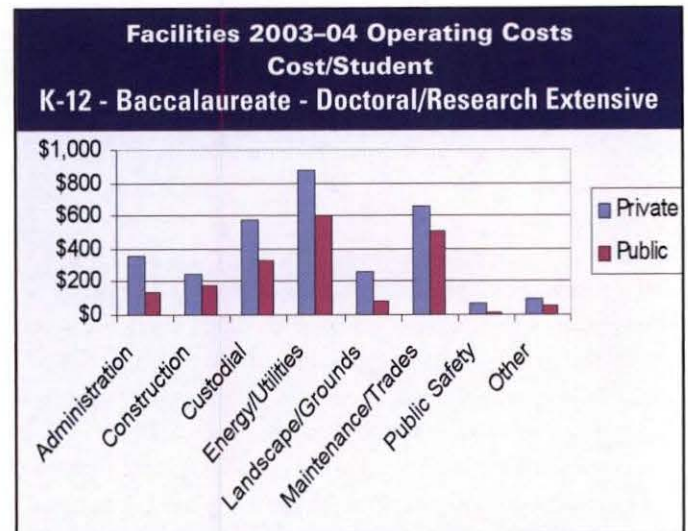


Facilities 2003-04 Operating Costs

	Private	Public
Administration	\$ 354	\$ 134
Construction	\$ 249	\$ 180
Custodial	\$ 575	\$ 328
Energy/Utilities	\$ 881	\$ 601
Landscape/Grounds	\$ 257	\$ 76
Maintenance/Trades	\$ 656	\$ 501
Public Safety	\$ 65	\$ 20
Other	\$ 95	\$ 53
Total	\$3,132	\$1,893

Even though the private institutions have a greater reliance on student fees than public institutions, their costs are higher, not lower than the operating costs/student of public institutions. Of course the private institutions have a tradition of quality grounds and facilities and in many cases the burden of historic buildings. In this Core Data survey group, the student building use ratio of private schools is 20 percent lower than that of public institutions (442 GSF/Student for private institutions in this Core Data universe as versus 563 for public institutions). That means the private schools have a smaller base for amortizing operational costs when costs are compared to student FTE.

Here is another interesting view of this statistic:



Facilities 2003-04 Operating Costs

	K-12	Baccalaureate	Doctoral Research Extensive
Administration	\$ 590	\$ 262	\$ 88
Construction	\$ 369	\$ 179	\$ 103
Custodial	\$ 519	\$ 587	\$ 289
Energy/Utilities	\$ 816	\$ 926	\$ 769
Landscape/Grounds	\$ 360	\$ 234	\$ 81
Maintenance/Trades	\$ 742	\$ 608	\$ 336
Public Safety	\$ 195	\$ 24	\$ 31
Other	\$ 124	\$ 106	\$ 67
Total	\$ 3,715	\$ 2,926	\$ 1,764

This displays the K-12 group (28 schools, 89% of which are private), the 35 Baccalaureate colleges (74% of which are private), and 56 Doctoral/Research Extensive universities (86% of which are public). It is a snapshot of three distinct levels of educational institutions and a comparison of mostly private K-12 and Baccalaureate against mostly public Doctoral/Research Extensive schools.

The K-12s have the highest operating costs/student. Compare the administrative \$590/student cost of K-12 schools to the \$262/student average cost for Baccalaureate colleges and the \$88/student cost in Doctoral/Research universities. The fixed expenses of administration (the need to fill certain facilities management positions regardless of the size of the student population) appears probably is one of the factors of higher costs.

Management of the construction program, building maintenance, and landscaping/grounds maintenance also show a stepped cost pattern. The exception to this pattern is where

Baccalaureate colleges have higher custodial costs/student than those of K-12.

It is interesting to see that energy/utilities operating costs/student are about equal among the three categories of educational institutions. We will watch this statistic in future years to see if a more of differentiation is shown.

Core Data Reports/*Facilities Performance Indicators*

The Core Data reports are being put together as this article is being written. The CD will knock your socks off! It gives the participants that agreed to share their identity a wonderful tool for comparing their information with those of other participants and for mining out causes of differences.

The CD contains three reports; Operating Costs, Buildings & Space, and Personnel Data & Costs. There are display tables, bar charts, a text report, and downloadable files for each of these reports. The user will be able to toggle from one report to another with ease.

The CD takes a new approach to displaying Core Data information. When the new report format was being designed, the question was asked: "What does a professional need to know to evaluate statistics on their operation?" The answer was a number of things. The "need to know" was only being partially met, so the challenge was to come up with a new design that addresses a broad range of information interests. The description below uses the Maintenance function in the Operating Costs Report to illustrate new functionality found on the Core Data report CD.

- In-depth analysis will occur at a function level.
 - ❖ The reports are organized around function (Administration, Construction, Custodial Services, etc.) rather than shown as tables by a type of measurement (Cost/GSF by Funding, by Carnegie, by Enrollment Range, etc.)
- There is a strong need to compare one's campus ratios/measurements against specific schools in the study.
 - ❖ Data on any three participant campuses (that have given permission to release their identity to other participants) can be displayed at one time and the choices can be changed at will.
- It is important to see related measures to judge whether there is a consistent pattern and to evaluate the relationships among ratios/measures.
 - ❖ The user will see many operational perspectives for a function. For instance, the ratios/measurements for the maintenance function has the following string of ratios/measurements in a row:
 - Total Operating Cost/GSF
 - Labor Cost/GSF
 - % of All Functions' Operating Costs (without Purchased Utilities)
 - % of All Functions' Operating Costs (with Purchased Utilities)
 - % Total Facilities Expenditures

- Maintenance GSF/Maintenance FTE (1)
- Maintenance Cost/Student
- % Maintenance Costs are Contract Services

- Institutional performance is judged against pertinent group averages.

- ❖ The group averages for the Maintenance function measurements that can be selected are:

- Overall (all participants)
- Funding (public/private)
- Carnegie Classification
- APPA Region
- Enrollment Range
- Auxiliary Service Expenses Included or Excluded
- Average Building Age Range
- Percent of Maintenance Contracted Range

You will notice the introduction of summaries that offer new insights. For instance, if the average age of your campus buildings is 65 years, you may be interested in seeing the average maintenance costs for campuses with buildings in the age range of 50+ years old.

- There are significant data points that formed the measurements or show the story behind the figures.

- ❖ The row of significant data points for the Maintenance function are:

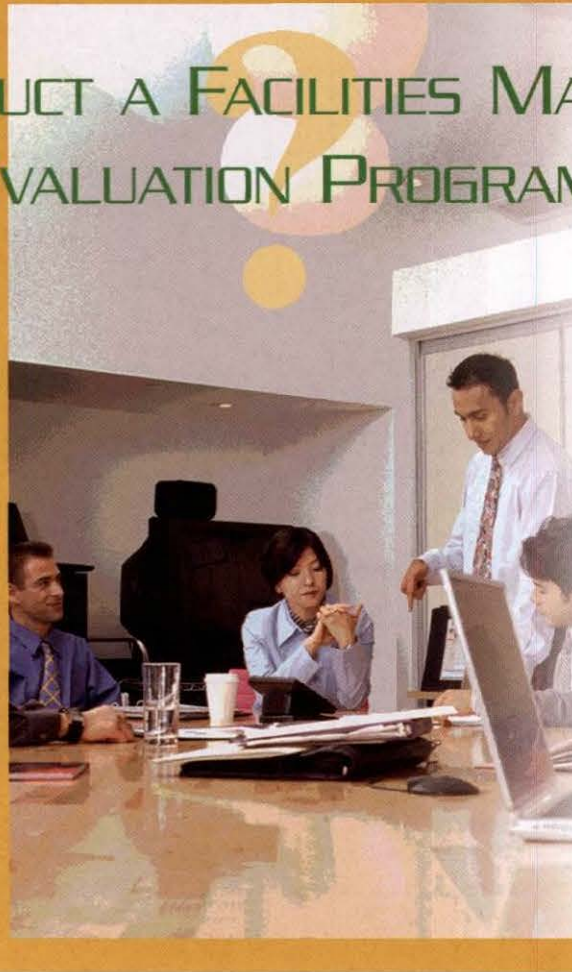
- GSF
- In-house Labor
- In-house Non-labor
- Contract Costs
- Repair & Spare Parts Costs
- Total Operating Costs
- Staffing FTE
- Average Benefits %
- Number of Campus Buildings
- Average Age of Buildings

All three CD Reports have the same characteristics as described above, but the Personnel Data & Costs Report has unique displays so that one can view salaries, FTE, and collective bargaining representation as well as measurements and group summaries by facilities function. The CD can be a primary source of comparative cost and statistical information for facilities operations.

Join the next Facilities Core Data Survey this fall so you too can use this new, prized APPA tool. You no longer will be wondering how to answer questions about your facilities operation—the answers will be a toggle away on the *Facilities Performance Indicators* CD! 🏰

WHY CONDUCT A FACILITIES MANAGEMENT EVALUATION PROGRAM

By R. Holly Judd



APPA's Facilities Management Evaluation Program (FMEP) provides the chief facilities officer of an institution with the opportunity to have an evaluation by a team of APPA members from organizations with similar education, financial, and physical characteristics. It is designed to assist any institution in determining the value of its program and the commitment required to conduct such an evaluation.

The objective of the evaluation program is to provide institutions with a snapshot or profile of the quality of the processes used and the results achieved by the facilities management department. The profile is developed by examining the department in key areas to determine the degree to which goals and objectives have been established, the extent to which these are being fulfilled, and the effectiveness of the processes being used to pursue stated goals.

For example, the program focuses on the mission and standards that have been established by the institution and the degree to which they are being met. Many of the processes used to achieve the institutions' goal are assessed within the context of recognized management practices and their alignment with the institution's policies, procedures, and practices.

Since February 1989, APPA has conducted 80 comprehensive organizational evaluations through its Facilities Management Evaluation Program. A representative sampling of

institutions participating in the program to date include major state and/or research universities, small liberal arts colleges, health science centers, a national laboratory, boarding schools, and world-renowned art museums. Along the way, several hundred experienced evaluators have participated on FMEP teams thus far.

You will find that the overall cost for this standards-based program is reasonably affordable. Determination of your individual institutional

rate is based upon a combination of the institution's full-time equivalent (FTE) student enrollment, its gross institutional expenditure (GIE), the complexity of the operation and its service delivery system, and the logistical expenses for the team's site visit to the campus.

The entire process of the FMEP, including delivery of the final report, normally takes 12 to 16 weeks. Therefore, it is essential that the institution provide the evaluation team a complete and detailed self-evaluation (<http://www.appa.org/recognition/fmepself.cfm>) at least three weeks in advance of the scheduled site visit. This criteria encompasses the following Baldrige-based categories with specific informational and performance items listed under each of these categories:

- Leadership
- Strategic & Operational Planning
- Customer Satisfaction
- Information Analysis
- Development & Management of Human Resources
- Process Management
- Performance Results

Upon completion of the institution's self-evaluation, another important component of a successful evaluation takes place—the team's site visit. The Facilities Management Evaluation Program uses experienced facilities officers and

Holly Judd is APPA's executive assistant and logistical coordinator for both the Facilities Management Evaluation Program and the Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision. She can be reached at holly@appa.org. This is her first article for Facilities Manager.

other professionals to conduct the on-site evaluation. This experienced team is put together with the input and final approval of the requesting institution. A list of peer or aspirational peer institutions, as well as specific needs they may have in conducting the FMEP, helps inform the team member selection process. The number of team members is based on the size and complexity of the institution/organization and the number of days the team expects it will need to complete the evaluation. Teams are normally made up of a team leader and up to four team members with an on-site stay between two to six days of the report.

Upon completion of an oral exit interview/meeting, a draft report is prepared by the team and provided to the institution for final review and comment. After institutional approval is received, the APPA office handles final editing and the production of the report.

From the many recent evaluations conducted, three institutions in particular agreed to share their rationale for choosing to conduct an APPA FMEP and the benefits they have gained as a result:

Roberts Wesleyan College

T. Richard Greer

In November 2002, the Roberts Wesleyan College Facilities Department conducted a Facilities Management Evaluation Program. The decision to go through the evaluation was driven by a desire to measure the efficiency and effectiveness of our operation from an external viewpoint. We considered two possible options: 1) have an evaluation done by a company that provides facility management services or 2) utilize the APPA evaluation approach. The decision was made to use the APPA evaluation method and stemmed from the need to have 1) input from a separate source not linked to the potential sale for services, 2) evaluators who would also understand the uniqueness of the college and university environment, and 3) professionals from institutions with similar characteristics and background experiences perform the evaluation. These three factors guided the decision to choose APPA. It is important to note that this decision process was fully supported by and involved a deliberate conversation with the chief financial officer of the college.

The three-person evaluation team engaged in a very comprehensive review during their two- and one-half-day visit to our campus. The schedule was arranged to interview and have dialog with 22 key constituent groups not including myriad meetings with the facilities management team, building services, custodial, and grounds staff. To achieve this broad spectrum of input from the campus requires diligent advance planning and should not be overlooked. Evaluations at any level are only as good as the effort we invest in their success.

The APPA evaluation team made 26 specific recommendations or opportunities for improvements, covering the areas of

leadership, planning, customer satisfaction, information analysis, human resources, process management, and performance. In addition to these recommendations, there was affirmation of what was being done well which served as a good source of encouragement and further built the facility staff morale.

Now that we had this wealth of information it would only prove to be as valuable as the extent to which it was implemented into our daily activities. Assessment without implementation results in wasted resources. The facilities management team reviewed the report and it was sent out electronically to all of the participants in the evaluation. The facilities management team met weekly, specifically to develop a prioritized action plan to implement the recommendations. The action plan required changes in processes and methods that would effect all of the facilities staff and ultimately, in a positive way, each of our customers.

During this time the college implemented a plan to have each division and department develop an assessment and planning document similar in content to an accreditation self-study. This provided an opportunity to incorporate the FMEP recommendations into a comprehensive planning tool for the department. Monthly departmental meetings were dedicated to the development of the plan and the implementation of the recommendations. As a result, we developed a plan with both short-term and long-range goals and objectives that provided clear direction to our department and was fully supported by the department's employees, the senior administration, and the board of trustees.

Today, the facilities department is stronger, more effective, and has a greater sphere of influence throughout the institution. The recommendations that were provided and continue to be implemented have played a valuable role in the department's development enabling us to better support and serve our customers. To be effective requires an ongoing commitment to improve. When we become content with where we are as a department not only does growth stop but also a gradual backward slide takes place and can undo all the progress that has been made since our evaluation in November 2002.

In our experience, the Facilities Management Evaluation is a tool that creates the opportunity for success when combined with the commitment of the facilities professionals to pursue excellence.

Queens University

Tom Morrow

Early in 2002, the senior management responsible for the facilities at Queen's University at Kingston were exploring options for undertaking an external review of the structure and management of the facilities area. Ultimately we selected APPA's Facilities Management Evaluation Program. To assist others who may be considering the use of this APPA service, we wanted to share with you the reasons why we undertook the review, how useful the review was to the department, and

our overall sense of the review process.

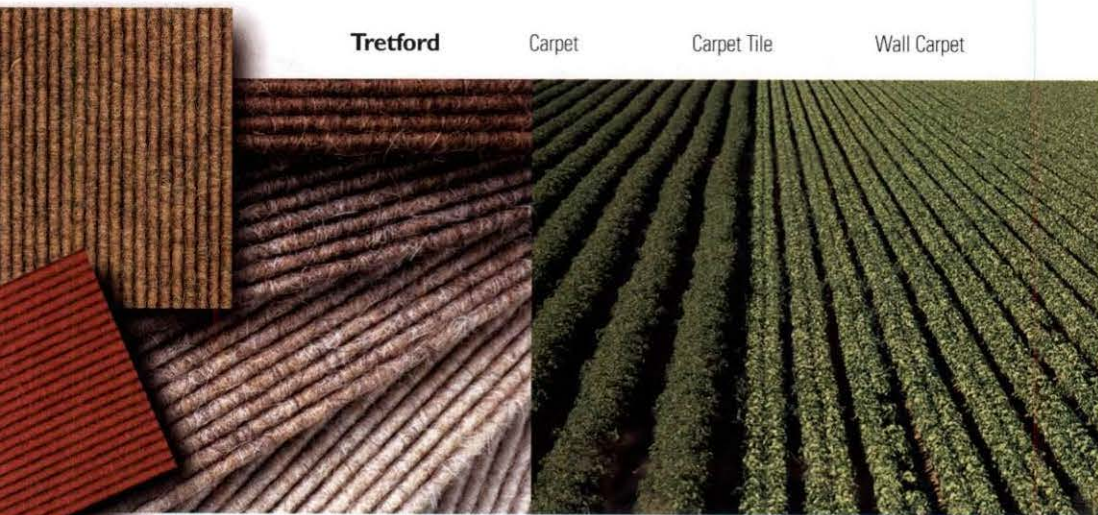
Queen's University, an international university with a reputation for excellence in teaching, research, and scholarship, is located on the north shore of Lake Ontario in Kingston, Ontario, Canada. The university has a population of approximately 18,000 full-time and part-time undergraduate students and approximately 2,500 graduate students. The university includes the faculties of Arts & Science, Applied Science (engineering), Health Sciences (includes medicine, nursing and rehabilitation and occupational therapy), Law, Education, School of Business, and School of Graduate Studies. A staff of approximately 200 is responsible for campus planning, facilities maintenance, custodial services, and project management, comprising 170 buildings and 4.5-million square feet.

The decision to proceed with the Facilities Management Evaluation Program (FMEP) became an obvious choice once our goals were established. We looked at self-evaluation alternatives including the self-managed approach to an FMEP. However, with the strong tradition of external reviews by the academic departments within the university, putting in place a similar review process for one of the major administrative units was a high priority. It was also time to review a major reorganization within the Physical Plant Services area that had been implemented in 1995 to access how well the efficiency and customer service objectives of this change were being

achieved. The university also wanted assurance that the major risks associated with the facilities side of the organization had been identified. Again, the structured approach to the FMEP would assist in providing this assurance. The process also permitted the facilities area to obtain an independent assessment of how the unit and its services were viewed by the campus community; while we regularly solicit feedback in this area, verification of our results through the FMEP process would strengthen our resolve for the priorities for the department.

The following steps were taken that enhanced the success of the program. Having senior management within the unit initiate the review clearly signaled to the campus community and the people within the departments the importance of the review and openness on the part of the department to embrace change. A commitment was also made early on to share the results of the review. A meeting with members of the department was held to review the findings and the complete report was posted on the departmental website and available to everyone.

The university also played a very active role in the selection of the APPA representatives to lead the review. The results support our desire to have both a representative from the university system within the province of Ontario as well as representatives from other jurisdictions. This was important to the credibility of the review both within the department and on



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the campus as a whole. We also actively recruited sectors of the campus community to be engaged in the review; the review team met with students, representatives of academic departments at various levels of the organization, senior management as well as members of governance committees.

The Facilities Management Evaluation Program met our objectives well. It reinforced in an impartial way the departments view that we are doing a good job with the resources made available to us. It reinforced a number of initiatives we have undertaken over the past years and the recommendations encouraged us to continue and expand a number of these initiatives. It has been a boost to employee morale. It has been helpful in the development of our budget plans and in arguing for improved support for the facilities area. It ensured we had not missed major risk issues as those close to the area naturally focus on the day-to-day pressures of providing services.

This program clearly met the objectives we set for it and was worth the effort in undertaking the review.

Portland State University

Robyn Pierce

The APPA Facilities Management Evaluation Program provided a comprehensive tool for the incoming Portland State University Director of Facilities & Planning (FAP), Mike Irish, to assess the condition of the administrative operations as well as the service impression left on members of the university community by the members of his new staff.

Mike returned to Portland State University (PSU) after 18 years, four universities, working as a construction inspector/project manager, assistant director, director and associate vice president. Returning to Portland and PSU offered new challenges and a chance to return home to close family members in the metropolitan area. Mike also supervised the construction of several campus buildings during his earlier tenure at PSU.

When Mike began work on campus in January 2003, he immediately set expectations for his management team and he demonstrated the traits he wanted to see in their behavior, operations, and service levels. He asked that the department be scheduled for the APPA FMEP evaluation as soon as possible. Simultaneously he was working to refine administrative processes and improve documentation and accountability.

The FMEP was conducted in June 2003, by a team led by Thomas Stepnowski, former director (retired) facilities maintenance services at Rutgers University of New Jersey. The team consisted of Earl Smith, facilities director at Williams College and Ronald L. Bailey, operations analyst and property manager at Western Washington University. They conducted interviews with university community members at all levels including executive level staff, campus customers (including students), and FAP departmental employees. The APPA team also researched background information, reports, and field verified information provided by the department in its self-assessment.

All of this was occurring at a time when the Oregon Legislature was in session, revenues were in severe decline, and the budget picture looked bleak. So bleak in fact that the governor had ordered all public employees, including represented employees, held without additional compensation or any financial mechanism for recognizing merit or retaining services indefinitely.

PSU has been fortunate to have a dedicated and loyal group of employees in the Facilities & Planning Department. These employees constantly look for better ways of performing their duties and providing paramount service to their customers. The trades workers have proved that some things are not for sale and dedication has no price. Initially met with a resist-

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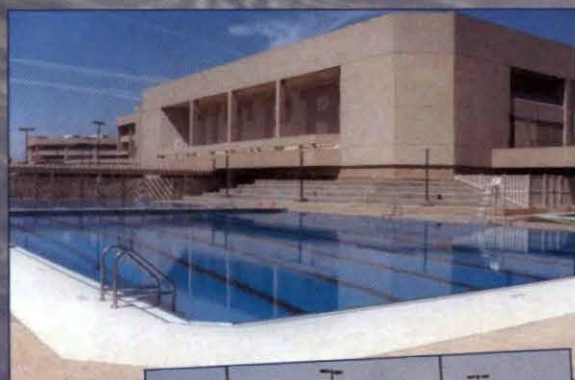
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ance to change, this group has made the fastest progress to change business practices and take on new challenges. Growth of in-house work has almost doubled the size of the FAP workforce since Mike arrived.

The FMEP report was the best tool for PSU's transition under new leadership. The FMEP program utilized seasoned professionals that have dealt with similar situations and provided experienced peer analysis of functionality and operations. The APPA team was able to quickly get up to speed and assess the strengths, opportunities, weaknesses, and threats to meeting the goals and objectives of the department and the university.

As expected, the FMEP report detailed the requirement for additional documentation of standards at PSU. This is an ongoing process as procedures are evaluated, realigned, and solidified. Documentation is developed from the ground up working through all associated employees. The shift had already begun under Mike's leadership to build active cooperation in planning and decision making. A significant reduction in outsourcing has allowed the department to self-perform many more functions while growing the numbers of well qualified in-house staff. Employees continue to be provided specialized training and advanced education. Customer service, team building, and conflict resolution trainings for all staff are conducted through comprehensive full or half-day



seminars. A current endeavor is underway to procure and provide identifiable uniforms for all staff. The committee is a mixture of trades workers, union representatives, managers, and administrative staff.

The FMEP report provided a brutally honest assessment of weaknesses blended with insightful suggestions and recommendations for improvements and growth, resulting in constructive forward progress toward meeting the departmental goals. It allowed Mike and his management team to focus on

actions to turn weaknesses into strengths and build a future out of rubble left from years of downsizing. The silos continue to be broken down in Facilities & Planning and across all elements of Finance and Administration at PSU. The vice president is supportive of current operations and endeavors to improve service. While Facilities and Planning is still faced with a state legislature that continues to poorly fund higher education and expects campuses to absorb additional unfunded mandates and a booming student enrollment, our staff has found new pride and an excellent road map for success as provided by APPA's FMEP Team.

If you would like to learn more about the Facilities Management Evaluation Program, please call 703-684-1446 ext 234 or visit our website www.appa.org for additional information. 🏢

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MAKING THE BUSINESS CASE FOR **SUSTAINABILITY:** IT'S NOT JUST ABOUT GETTING POINTS!

By Christopher P. Hodges, P.E., CFM and William W. Elvey, P.E.

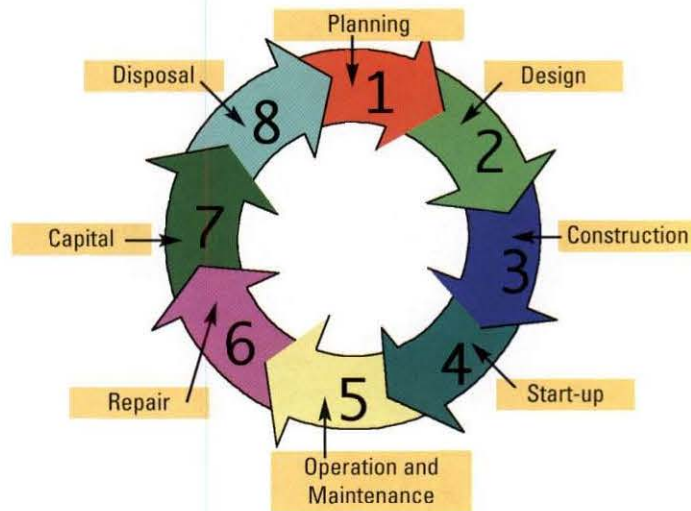
Architects and designers have done an admirable job of bringing sustainability and “green” buildings to the front of our consciousness in recent years. Once only the battle cry of environmental activists, environmental stewardship has reached the mainstream of our society. However, as effective as the “green” movement has become, we still have a ways to go toward making our facilities sustainable.

The term Sustainable Facility Management (SFM) has cropped up over the last several years and may soon dominate every aspect of the way we design, operate, maintain, and ultimately dispose of our facilities. Architects and designers have always addressed the design and build portion of the building's cost, however, that is typically the least costly and shortest portion of a facility's life cycle. The operations, maintenance, and capital renewal portion of the facility life cycle is the most costly and accounts for more than 95 percent of the time on the facility life cycle timeline.

That is precisely the portion of the facility's life that is under the direct care and management of the facilities manager.

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Figure 1—Building Life Cycle



ager. Yet, most facilities administrators do not have much influence over the design and construction of the buildings they inherit. Now is time for the facilities manager to have their say.

Why the Facilities Manager?

It's all in the numbers—facilities professionals manage and control facility related O&M expenditures, which account for over 85 percent of facility life cycle costs. Facility operations and maintenance and demolition/capital renewal costs over the useful life of the building can be up to 40 times greater than design and construction costs. Yet, most decisions that

have an effect on sustainable and green practices are made with an eye toward reducing first costs without regard to these "life cycle costs."

There currently are significant disagreements about the construction of green buildings in the United States. The disagreement exists because it is difficult to justify long-term savings when higher initial costs for green buildings are the major consideration. Making the business case for sustainable practices becomes an important skill for the facilities manager. This is a skill that is not always present in your tool kit, and it takes time to develop in even the most seasoned of veterans.

What's Behind the LEED Point System?

The United States Green Building Council (USGBC) has had significant impact on the design and construction market over the past several years. The Leadership in Energy and Environmental Design (LEED) program was created to accredit buildings that use design and construction practices that minimize the negative impact on the environment and save energy. The LEED program measures the buildings effect on sites, water efficiency, energy efficiency, use of materials and resources, and indoor environmental quality.

All of the LEED programs are points-based. Certifications are granted under LEED for new construction and for existing buildings based on the ability to meet the minimum amount of points necessary for "Certified," Gold, Silver, and Platinum levels. The USGBC deserves much credit for putting a competitive spirit back into the design and construction process. Designers are seeking new and creative ways to seek LEED points for their buildings.

The LEED program has also been extended to existing buildings through LEED-EB. The LEED-EB program will only apply to an older structure if it is undergoing a significant renovation where the owner decides to attempt to certify the building under the LEED program. This applies to an inventory of millions of existing buildings that facilities managers are tasked with maintaining and which have generally older, less energy efficient systems.

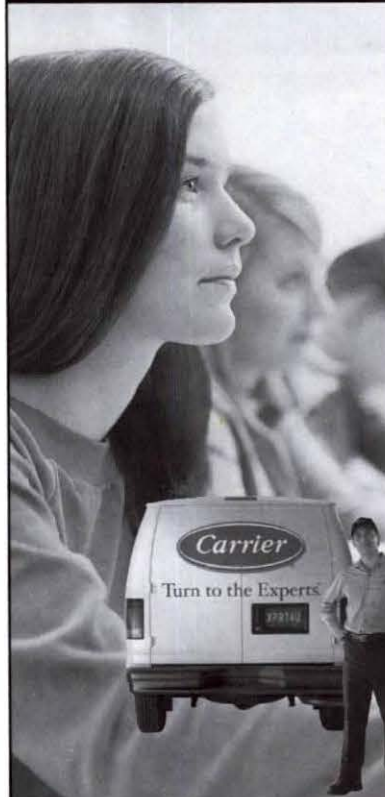
What does all this mean to you? Facilities managers can seek LEED certification for their new construction, and most campus design and construction groups are seeking at least a minimum level of sustainability in their new facilities, even if they have not completely bought into the LEED rating system in new construction, or are still struggling with the cost of green construction. The existing building

program is still in its infancy, and it will take several years to become commonplace on campuses as buildings undergo major renovations.

Sustainable construction practices have become more commonplace on campuses. Practices that encourage the use of day-lighting, more efficient lighting fixtures, energy efficient roofs, energy efficient equipment, less dependence on harmful materials, use of more local materials, reduced VOCs (volatile organic compounds), and many other practices are now commonplace. Most campus design and construction groups are familiar with, and some are leading, the LEED movement in new construction.

As most facilities managers know, sustainability in design and new construction is an admirable goal, but there is a gap between new construction and day-to-day operations. After all, it does little good to design and build millions of dollars worth of energy efficient, well lighted interiors with lots of natural lighting if the building users draw the blinds every day to reduce the glare on their computer screens. Energy efficient HVAC systems can save in utility costs, but some of those good efforts can be thwarted if every other desk in the occupied office space has a fan or space heater under it. The same energy waste can occur in a university research and development setting where fume hoods are left running constantly after their required usage is completed or in any set-

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ting where lighting is left on, long after occupancy. That's why sustainability is not just about design and construction—it needs buy-in from those who manage day-to-day operations, and those who use and occupy our facilities.

An Effective Approach to Sustainability

The real impact of sustainability on most campuses comes from their energy management practices. Energy management is first and foremost on the minds of progressive directors of facilities. It is in these day-to-day operations of buildings that we can reduce utility consumption and waste and can return significant savings to our institutions.

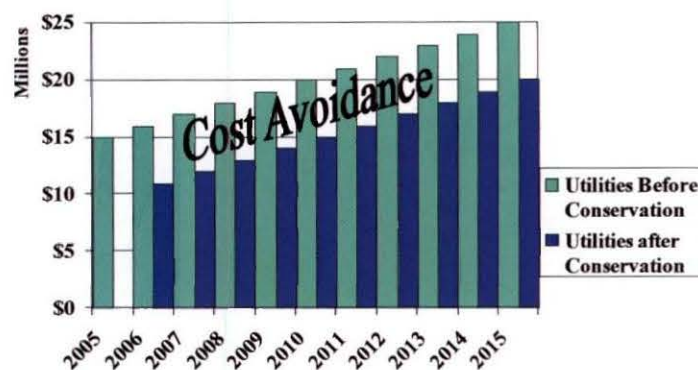
According to most benchmarking studies a significant portion of a campus operating budget is spent on utilities, typically in the \$1.50 to \$2.00 per square foot range, on average. With millions of square feet of campus buildings, just a small incremental saving on utilities can lead to millions of dollars toward the bottom line of the college, university, or school. Those millions saved can be applied to a number of institutional initiatives.

At Virginia Polytechnic Institute and State University (Virginia Tech), energy management has been a long-standing concern of the facilities group. With over 200 buildings on 2,600 acres in Blacksburg, Virginia, energy and utility management has been part of the design, construction, and operations and maintenance for many years.

Virginia Tech has been faced with numerous logistical challenges. One of the primary challenges is to meet the changing needs of the institution as its mission changes to allow it to move to a higher placement on the list of top research institutions. Research facilities can be some of the most energy-intensive facilities built, and the challenge is to reduce energy and utility consumption in the face of higher demand and higher prices.

At Virginia Tech, there are traditional energy management initiatives to create efficiencies and reduce energy consumption. Water management, building control upgrades, lighting retrofits, daylight harvesting, energy efficient roofs, and the use of energy management software are just a few of the initiatives used at the campus. There are also other options such as using energy performance contracting services (EPCS) to

Figure 2 - Theoretical/Traditional Energy Project Financing Model



reduce the energy required to run the campus and fund capital projects with a shared-risk/reward approach with outside contractors. Virginia Tech and other universities also have an advantage in that not only are they major users of energy, they also have power generation capabilities. This gives them the advantage to control their own energy future and reduce dependence on utility companies. Hence, Virginia Tech is exploring the construction of a biomass power plant to help it meet future energy needs.

Virginia Tech's focus on utilities and energy consumption has led them to hire a full-time energy manager, whose task it is to monitor and review all energy savings initiatives, and promote the business case for energy management and sustainable practices.

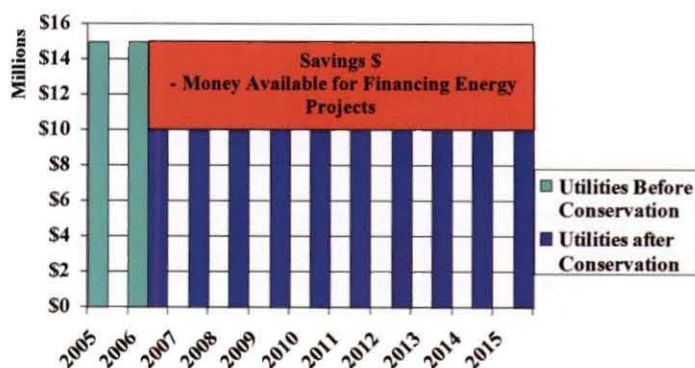
The goal for the near term is to continue to meet the growing needs of the institution, counteract the growing cost of energy, and reduce the university's energy bill, all at the same time. Traditional models for saving energy look at relatively constant energy consumption and cost models by implementing incremental energy savings technologies. The challenge at Virginia Tech is to meet a constantly increasing energy demand and rising costs. This requires a much more aggressive energy program.

How Do You Meet These Aggressive Goals?

It can't be done by facilities management alone. The involvement of the academic community is critical to the success of an aggressive energy management program. Buy-in by the administrative and business groups is also required so that the long-term view of sustainable and energy savings practices can be adopted. That's where the business skill of the facilities manager comes in handy. The better we are at building a solid business case for sustainable practices, the more effective we will be at selling these ideas to the business and administrative community.

At many universities, the business and administrative community creates the financing and accounting structure that either allows smooth transitions toward energy and sustainable programs, or provides significant obstacles. Those obstacles are often created through outdated cost allocation models that get in the way of sustainability programs.

Figure 2—Theoretical/Traditional Energy Project Financing Model



As is sometimes the case, the obstacle to green and sustainable practice implementation is the inability of the current cost-allocation structure to allow expenditures toward green programs where there are multiple (sometimes competing) groups involved. Institutions must find ways to reallocate costs to take advantage of campus-wide energy use and green programs. It is often left to the facilities professional to make the business case for these initiatives to the business managers. Speaking the language of the business managers can often mean the difference between success and failure of these energy saving and green programs.

The "selling" of these ideas may not be as difficult in the academic community as in the business community. That does not mean that communication with and participation of the academic community is any less important. At Virginia Tech, the facilities group and the energy manager spend a significant amount of time with the various student and academic groups on campus in order to build consensus and momentum toward sustainable practices.

The facilities manager can also introduce a much-needed component to the design and construction process—systems thinking. Systems thinking is the ability look at the entire campus and make energy and sustainability decisions that tie groups of buildings together and make them perform in a more economical manner.

Facilities managers need to be integrated with the design and construction team to assure that design and construction practices lead to facilities that can also be operated and maintained for many years in a safe and economical manner. The integration and partnership piece of the puzzle requires input from a diverse group, including designers, administrative and business managers, academics, end users, front-line trade's staff, and facilities management.

In the academic world, developing sustainability and energy management processes involves three steps:

1. Develop a sound, well thought out **sustainability and energy management policy**.
2. **Get the right people involved** that represent a broad range of interests.
3. Create a **new business model** to allow full use of sustainable and energy savings practices applied over the entire system.

Conclusion

Admittedly, energy programs are just one aspect of sustainable practices. But in a campus setting, it may well be the

most important and difficult practice to implement. The facility group can rarely accomplish the task of getting energy and utility use under control by themselves. It takes buy-in from all parties—students, academic groups, administration, design and construction, and facilities management.

A sound approach to sustainability is to put together a well-developed policy on energy management and get the right people involved. Without the consensus and active participation of all parties, aggressive energy management programs have little chance of success.

It's not just about LEED points—sustainable practices are being undertaken in all areas of facilities management. Over time, the most influential person in sustainability and green buildings may well be the facilities manager—the person with the most influence on the way we operate and maintain our facilities and with the greatest ability to control costs.

Facilities management must also take its rightful place in the design and construction process in order to impart true operations and maintenance experience. If you really want to know how well a facility runs and how efficient it is, ask the facilities management group. They have control over the majority of the operating life of a facility. The type of experience a facilities manager can impart early in the planning or design process can be invaluable in the safe and cost-effective operation of facilities. 🏢



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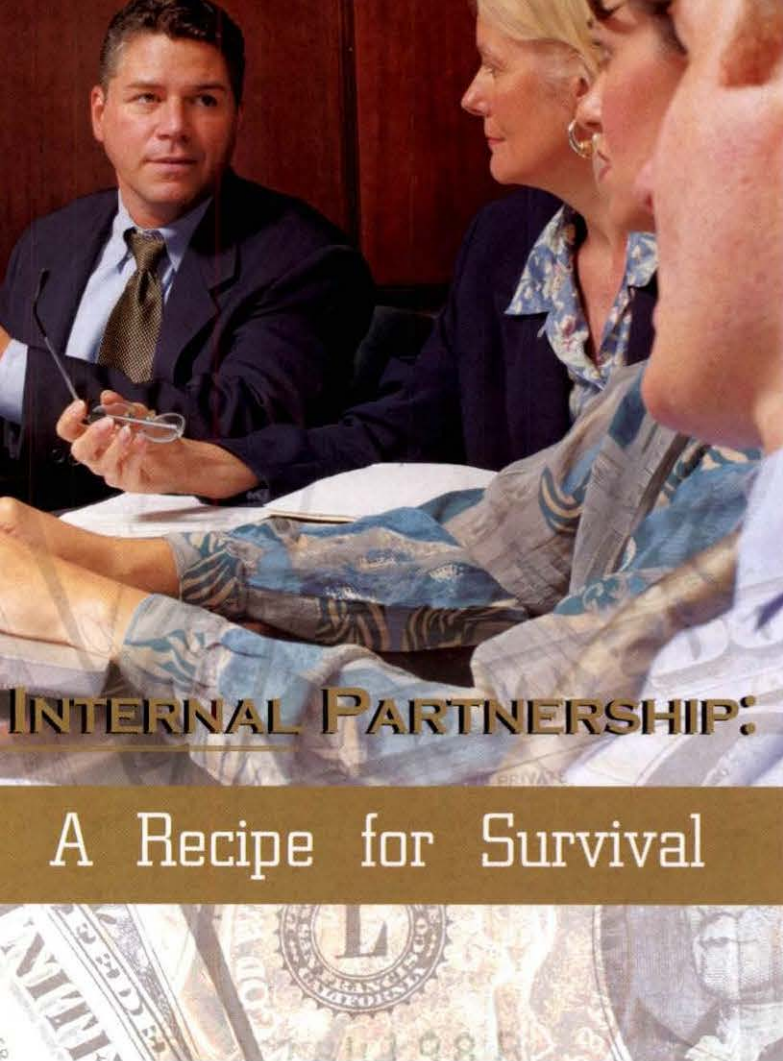
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INTERNAL PARTNERSHIP:

A Recipe for Survival

By Nathan Norman and Tanisha McClinton

In a time when budget cuts are taking place at institutions everywhere, the need for cutbacks became even more vital at the University of Michigan's Plant Building Services Department (PBS). This department had to make a decision on how to deal with the constraints as a result of the decline in state funding. Whenever resources are scarce, a company, institution, or department must look at the most efficient way to reallocate resources to maintain and enhance services. This is exactly what PBS was able to accomplish. In December 2002, PBS entered into a formal agreement with University Stores. This was a collaborative effort that resulted in benefits for both parties.

Nathan Norman is the director of building services at the University of Michigan, Ann Arbor, Michigan; he can be reached at nnorman@umich.edu. Tanisha McClinton is a publications specialist at the University of Michigan and can be reached at liltm@bf.umich.edu; this is her first article for Facilities Manager.

Plant Building Service History

In 1999, warehouse manager Richard Williams wanted to address the lack of space available in the university's warehouse facility. The warehouse was unable to meet the increased demand for product storage space (due to the growth in serviced square footage on the Ann Arbor campus). After researching several options, a proposal to build a new facility that would accommodate the need for space, now and in the future, seemed like the best solution. The new facility was approved and built in 2000. With the new warehouse built and the need for space addressed, PBS focused their attention on a new problem, an inefficient warehouse management system. The software then being used was incompatible with the University Stores' software, which made communications difficult. In addition, this process was inefficient because it took too much time, too many resources, and was prone to errors.

Looking Into New Resources

As a result of decreases in state funding in 2001, budget cuts were inevitable. Programs and procedures that were vital to the department were at risk, as well as a reduction in workforce. The department had to evaluate activities and identify those activities that were under utilized and prioritize where resources should be spent.

PBS's approach was to increase productivity and consequently reduce overall operational cost. One of the areas targeted for improvement was the warehouse operation. Plant Building Services took two years researching the benefits of outsourcing the University Stores operation, which supplied about 90 percent of all supplies to PBS. They did this by meeting with external distributors for pricing, lead-time, customer service, etc. The department compared the quotes from outside vendors with identical products that were already being delivered through University Stores.

At that time there was no formal agreement between PBS and University Stores, which meant that prices and product agreements weren't always consistent. To alleviate some of the confusion, both parties began to weigh their options. At that time, building services departments at other universities were looking toward outsourcing; Plant Building Services began doing the same. They were seeking opportunities for cost savings. Not only was PBS looking to save money, it was also looking at other benefits that generally come along with outsourcing such as: increased technical support, warehouse management training, and improved customer service. The department was looking at these benefits to improve the inefficiencies at the warehouse. To their surprise, the prices that were being charged by University Stores were very competitive with outside distributors.

Building Services and University Stores Partnership

In recognition of the competition that University Stores was able to offer, PBS began to explore other, more efficient,

advantages they may be able to provide. There were some cases where the outside distributor's prices may have appeared to be lower than University Stores' at first, but when the administrative costs were accessed to Plant Building Services, it was either equal in price or above those charged by University Stores.

Some of the benefits that the department was looking for in outsourcing were also able to be provided by University Stores, such as a new warehouse management system that would give Plant Building Services direct contact to University Stores. University Stores would be able to track inventory at the PBS' warehouse, replenish stock in a timely manner, and provide reports that would aid Plant Building Services. This would also greatly improve communication. University Stores would be able to provide an inventory management system within the warehouse facility, which offered the benefits of having a more efficient warehousing operation.

The costs associated with this process represented a significant savings to the department. Plant Building Services began drafting a formal Service Level Agreement with University Stores. Through this collaboration, University Stores was able to develop a customized process for ordering, and provide system support and ongoing training for the staff of Plant Building Services. In an effort to keep costs at a minimum, University Stores agreed to buy the inventory and set up the PBS warehouse facility as a division within the University Stores Warehouse Management System. By proceeding with this process, it would mean there would be shared control of the operation.

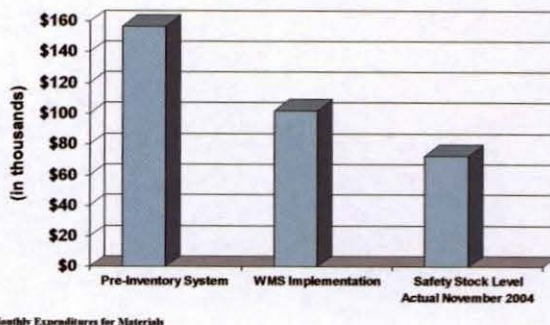
A major benefit to entering into this agreement is that PBS would not have to secure another software license which would have also included software cost of approximately \$250,000. The advantages to the department definitely outweighed the disadvantages, and in November 2003, Plant Building Services and University Stores entered into a formal agreement.

In order to prepare for the collaboration, new hardware had to be installed in the warehouse. The process began by assigning product locations, establishing the warehouse pick paths, reviewing product usage reports to set replenishment levels, and training Plant Building Services staff in receiving, stocking, cost, and order processing.

Current Situation

Plant Building Services has experienced tremendous benefits from their partnership with University Stores. One example is reduced lead time which results in lower emergency stock, leading to less money being tied up in inventory. Also, there is an improvement in inventory management because of the shared resources. For instance, Plant Building Services now uses University Stores' warehouse management software, technical support, and warehouse management support. PBS also has the advantage of sharing purchasing knowledge and administrative support with University Stores.

Figure 1 - Inventory Expenditure



The improved communication between University Stores and Plant Building Services definitely helped this transition, and the figures tell it all with the overall reduced markup of 14.5 to 9.4 percent in two years. As an auxiliary, University Stores is charged with funding its own operation. In the Service Level Agreement, Plant Building Services guarantees University Stores a predetermined dollar volume in sales. As a result of this guarantee, University Stores is able to reduce the margin applied to the products and services they offer. University Stores is also able to negotiate better pricing with their suppliers based upon volume buys.

Future Aspirations

University Stores is moving toward becoming more of an Integrated Service Center, offering additional services from inventory management to asset tagging and beyond.

By using University Stores, not only is Plant Building Services assured, but the University of Michigan knows that the people on this campus and in their facilities are employees of the same university and are expected to follow certain rules and regulations. The collaborative efforts between Plant Building Services and University Stores has allowed University Stores to live its vision of becoming the premier logistical service provider in fulfilling customer needs within the University of Michigan environment. They were able to maximize service and quality through the effective use of people, processes, and technology by providing specialized inventory management, warehousing, and delivery solutions. In order to ensure the longevity of this collaboration, both parties will continue to search for ways to save money, improve communications, and run more efficiently. 🏢



Meeting between Building Services and University Stores.
 From left: John Bogi, Nathan Norman, Lynette Wright, John Gleason, Zita Gillis, Rose Griffith, and Carl Smith



TRANSITIONS DRAMATICALLY

By Steve Glazner

After more than a decade of partnership with APPA, the U.S. Department of Energy's Rebuild America program has undergone a major shift. Effective May 2, 2005, the administrative management of the Rebuild America program has been transferred from the DOE to the State Technologies Advancement Collaborative (STAC).

Rebuild America is a network of hundreds of community-based partnerships that are saving energy, improving building performance, easing air pollution through reduced energy demand, and enhancing the quality of life through energy efficiency and renewable energy technologies. The goals of Rebuild America were to:

- increase the number of high performance buildings,
- implement energy efficiency and renewable energy improvements, and
- provide technical assistance tools, resources, and services.

Steve Glazner is APPA's director of knowledge management and editor of Facilities Manager. He can be reached at steve@appa.org.

STAC is a collaboration of DOE, the National Association of State Energy Officials (NASEO), and the Association of State Energy Research and Technology Transfer Institutions (ASERTTI). According to the STAC website (www.stacenergy.org), the transition of the Rebuild America program to STAC management "will be accomplished primarily through multi-state solicitations that facilitate projects and 'on-the-ground' results. The program will continue to provide centrally-managed technical assistance, coordinate stakeholder activities, and disseminate results."

It is too early to know how this transition will affect APPA member institutions and any current or pending projects under the Rebuild America banner. Nonetheless, APPA wishes to thank the following individuals for their support and assistance of Rebuild America over the years: Mark Bailey, Nick Keller, Pat LeDonne, and Dan Sze. They made great strides to better understand the K-12 and higher education markets and to find their best fit within Rebuild America.

Following is more information on the Rebuild America transition, taken directly from the Rebuild America website.

As the transition of management responsibilities for the Rebuild America program commences, clarification of impacts on several areas related to program partnerships and support going forward are necessary. The following Q&A format is intended to provide guidance to the Regional Offices, Program Team members, State Representatives, Partnerships, and others.

Question #1: Will Rebuild America continue to solicit or accept new partnerships into the program after May 1, 2005, when the Program will transition to STAC management?

Subject to guidance laid out in 1a through 1e below, The Department of Energy through Rebuild America (or its designated successor) will continue to accept new partnership applications with the following caveats:

- The online application process will be the only valid form for applying as a new community partnership; paper/fax submissions will no longer be honored.
- New and existing partnerships will shift to becoming predominantly self-service.
- New partnerships will be ratified and accepted by the designated DOE point of contact.

a. Will guidance be established and issued nationally with regard to the creation of new Rebuild America partnerships? Especially as they relate to DOE-funded activities, non-funded activities, and potentially, future STAC-funded activities.

This guidance continues to take shape as plans for completing the transition are finalized, including how existing and new Partnerships will be serviced. As additional issues are addressed that may affect this guidance, clarifications and further information will be distributed accordingly. This office pledges to provide the most accurate information available up to and beyond the period of transition to STAC.

b. How will this guidance be shared? By who? By when?

Guidance on the transition and clarifying information will be distributed to the Regional Offices in writing and through ongoing conference calls. Similar information will be shared with the larger Rebuild America community through a combination of email notices and postings to the Rebuild America website.

There are plans for at least two major transition information updates, in early April 2005 and another closer to the planned transition date of April 30. Other communications and information impacting the transition will be issued to the appropriate individuals as needed.

c. DOE currently has funded numerous grants (i.e., Special Projects) to state energy offices which have, in part, as their statement of objective the identification and creation of new partnerships - the results of which will be energy efficiency projects. In order for said grantees to fulfill their current financial agreements to DOE (and their anticipated

financial agreements under the FY '05 Special Projects as currently written), how will Rebuild America address these requirements?

Grantees in the State Energy Offices may contact the appropriate Federal representative to modify the grant language, with an eye toward de-emphasizing the formation of new Rebuild America partnerships as a focus for the grant. To the extent that the formation of new partnerships is required to achieve the grant's objectives, they may be created according to the terms laid out in Question #1.

d. For both the creation of new partnerships (i.e., partnership application) and the reporting of project metrics, the Rebuild America Web site serves as the mechanism to accomplish these tasks. Will this tool continue to be supported? If not, what mechanism will the State Energy Offices use to create/establish new partnerships and report partnership progress for the purpose of satisfying their grant requirements?

The Rebuild America website (or its designated successor) will continue to exist and serve as a tool and resource for new and existing partnerships and others. The Regional Offices will not be held accountable for the FY05 data pull for reporting program metrics beyond the end of second quarter fiscal year 2005 (March 2005) data collection.

e. If program metrics are sought from those projects and partnerships which DOE does not have financial contractual agreement with, who will initiate, facilitate, and provide the necessary technical support to accomplish this task?

The voluntary reporting of projects and metrics will continue to be available through the website. The website (or its designated successor) will continue to publicize accomplishments and best practices online as they become available. As stated above, there are no plans for bi-annual data collection initiatives as there have been in the past. Any focused efforts to collect or update project information, apart from mandatory grant responsibilities, will be at the discretion of the States and/or the Regional Offices, or by the Community Partnership.

Question #2: What commitment does DOE have to a Rebuild partnership under the current Partnership Application? Likewise, what expectations, if any, are implied?

The portion of the Rebuild America Partnership Agreement, as available through the website, that is most directly impacted by the transition is the section entitled "Basic Principles of Agreement." Specifically, there are five bullets that spell out the entirety of the DOE commitment in entering into this agreement. The agreement shall be modified to alter the first DOE commitment, as follows:

- Change the language "Assign a Program Representative who will be the point of contact for the Partnership with DOE" to read, "Assign a point of contact for the Partnership with DOE."

- This modification will allow the Regional Offices, working with their respective States to assign and establish partnership points of contact through their offices as needed.

As noted above in Question 1, the States and Regional Offices will have the authority and ability to ratify new partnership applications submitted through the website going forward. It is at this point that partnership points of contact can be coordinated for new partnerships.

For existing partnerships, States and Regional Offices may coordinate the transition of existing partnership contact with outgoing Program Representatives through the remainder of the program transition period, or before April 30, 2005.

All other commitments laid out in the Partnership Agreement will continue to be met, in whole or in substantial part, such that further modification of the agreement is not required at this time. As necessary, at a point in time after the transition to STAC, the Program Manual will be updated to reflect the new protocols.

Question #3: What, if anything can we say about how we see the quality and types service to the Rebuild America community in a post-STAC transition world. How will the new model operate?

The full functionality of the Rebuild America website will be preserved; the online Solution Center is the home for resources,

guidance, and technical information related to the spectrum of energy projects for Rebuild America.

- Fulfillment of requests will continue to be honored in the most cost-effective manner. This will mean that shipments will no longer be shipped by priority carriers and there will be limits placed on number of items available at any one time. As stocks are exhausted, product reprints from online digital files will be the responsibility of the requestor.
- Current and new Allied Partnerships in the private sector and strategic national associations will continue to be listed.
- Our partnership with those in the business community remains strong and we will rely upon the private sector to deliver the bulk of requested technical assistance. We will do everything possible to enable requests for technical seminars to be done directly by the partnerships.
- Success Stories and best practices will continue to be available; new material will depend to a large extent to the willingness of the partnerships and program participants to submit materials.

Question #4: If STAC anticipates capturing future relationships (i.e., partnerships) and resulting project metrics via the Rebuild America website (i.e., those project/activities to be funded under their upcoming STAC solicitation) the above may need to be further refined to account for this. Having two separate applications and reporting mechanisms would not be desirable,

especially since it is most likely that those activities currently funded by DOE would overlap with financial support to be provided by STAC.

As stated above, the Rebuild America website will remain available going forward. This is the home for partnership and project information and results. The details for handling information or any potential reporting requirements of the STAC grant solicitation is outside the scope of this guidance. 🏠

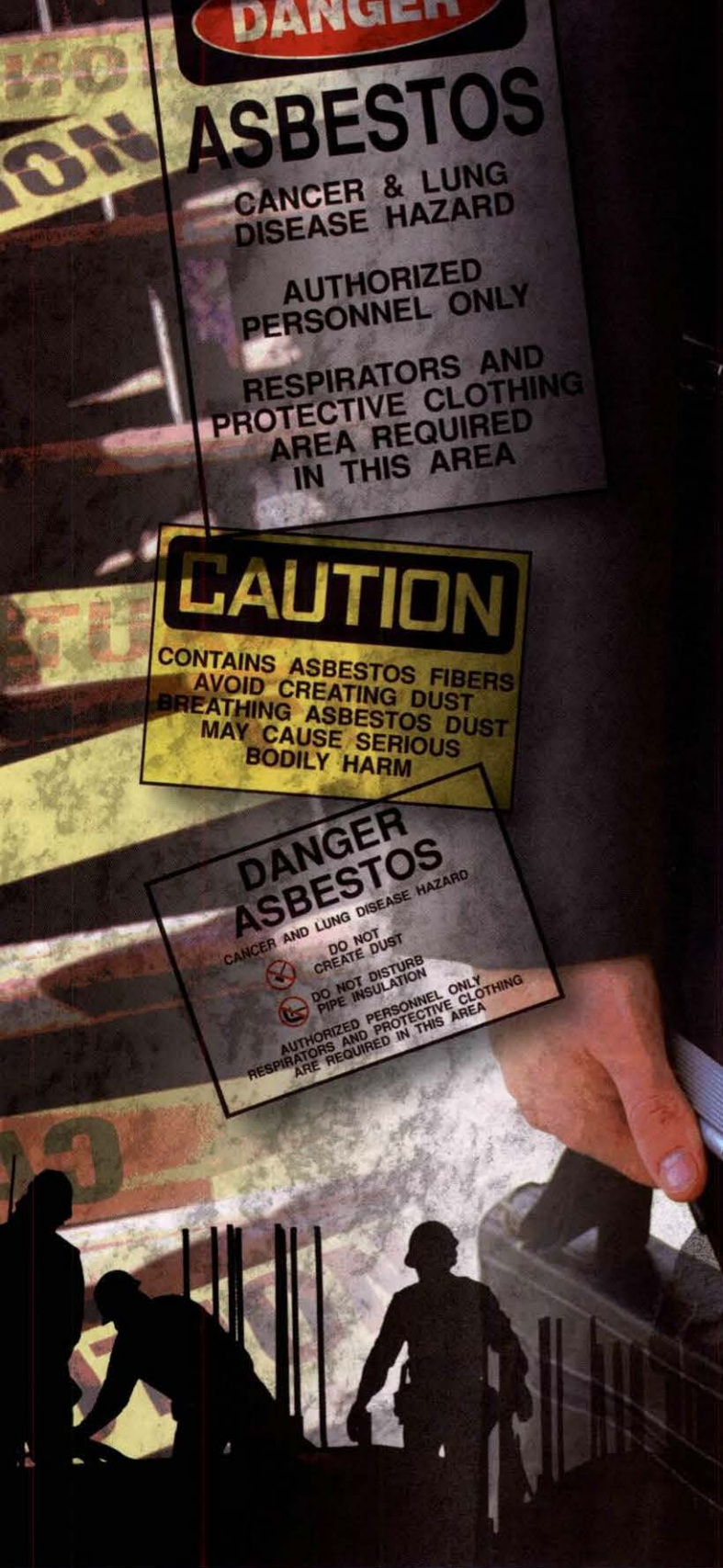
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Asbestos

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Conclusion

by Anne Gross

Eighteen years after a class action suit was filed, colleges and universities may soon receive reimbursement for a portion of the millions of dollars spent to remove asbestos from their facilities. Draft guidelines to govern the claims process for distributing more than \$50 million in proceeds were shared recently with the higher education community, and the court-appointed steering committee met in April 2005 to finalize its recommendations.

Under the committee's proposal, institutions that have not opted out of the class action will have six months in which to submit claims for reimbursement of asbestos abatement expenses. The court overseeing the suit may give the go-ahead to open the claims process sometime later this year.

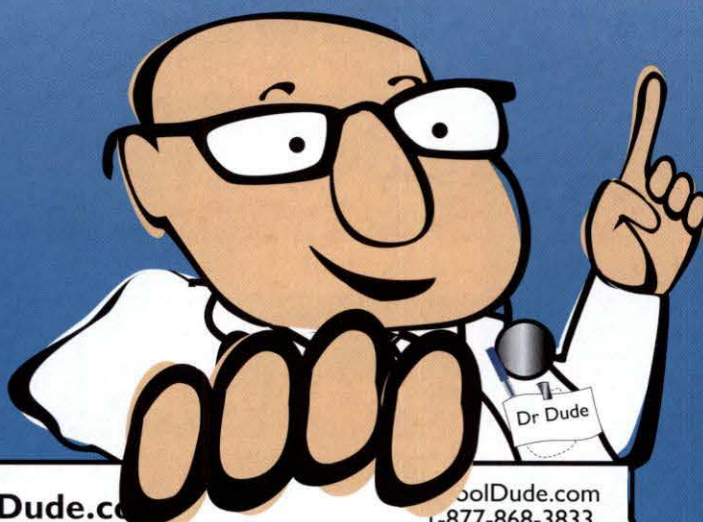
The percentage of each claim that will be covered will depend on the total amount of all claims submitted. Because the total claims are likely to far exceed the funds available, the proposed guidelines do not make any provision for reimbursement of future asbestos abatement expenses.

In a change from the proposed guidelines distributed for comment last February, the steering committee decided at its April meeting to recommend that institutions be given the option of submitting documentation confirming the asbestos content and quantity of material abated without proof of expenses incurred. A set amount based on typical abatement expenses would be imputed based on quantity of asbestos-containing material removed. Alternatively, institutions could submit actual asbestos-related expenses for reimbursement if they wished. The guidelines will specify which costs incurred during an abatement project will be reimbursable.

Anne Gross is vice president for regulatory affairs at the National Association of College and University Business Officers, Washington, D.C.; she can be reached at anne.gross@nacubo.org. This article, her first for Facilities Manager, was first published in NACUBO's June 2005 issue of Business Officer, and is reprinted with permission.

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- **ITDirect** – technology help desk management system
- **TripDirect** – trip planning and management system (available in late summer)
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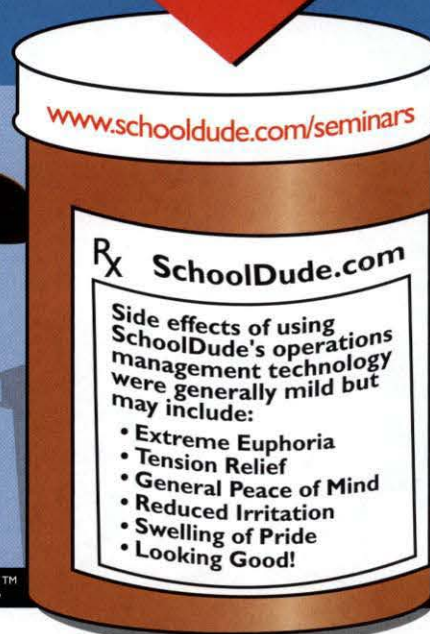
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The percentage of each claim that will be covered will depend on the total amount of all claims submitted. Because the total claims are likely to far exceed the funds available, the proposed guidelines do not make any provision for reimbursement of future asbestos abatement expenses.

Steps to Take Now

How can institutions position themselves to recover some of the money spent on asbestos abatement? We urge members to:

- Determine whether your institution opted out of the class action. Class members were given the opportunity to opt out in 1996. More than 200 institutions opted out; to view the full list, go to www.nacubo.org/asbestos.
- Schedule planned abatement work soon so it will be completed before the end of the claims period. Institutions often try to undertake this work during the summer, and summer 2006 may be too late.
- Begin to collect documentation for claims. The steering committee has attempted to minimize the burden placed on colleges and universities to submit paperwork while ensuring a fair and equitable claims process. At a minimum, claimants will have to demonstrate that the product abated contained friable asbestos and indicate how much was removed. If sufficient documentation is

available, there is no restriction for how long ago work was completed. Colleges that submitted claims in the Johns Manville bankruptcy in the early 1990s can use those claims as a starting point.

Resource Link

The draft proposed guidelines as they were circulated for comment (minus the changes made in April) are available at www.nacubo.org/asbestos. For questions, contact Class Counsel Ed Westbrook at ewestbrook@rpwb.com, or Anne Gross at NACUBO, 202-861-2544 or anne.gross@nacubo.org. 🏢

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The Value of Apprenticeship Programs

by Matt Adams, P.E.

The institutional environment in which facilities professionals find themselves requires high-quality trade skills. Despite the often repeated criticism that in-house staff are not as "cheap" as the local contractors that work on our homes, we are appreciated. The fact is, that given a choice, the faculty and staff of our institutions will typically chose to work with the in-house trade staff as opposed to outside contractors for project work. One of many reasons for this is the unique specialty of skill and understanding of trade staff coupled with their knowledge of the campus facilities. When lined up properly, this combination of skill and local knowledge affords the campus customers a high quality and efficient maintenance and project work force. The creation of these linked skills is achieved under the direction of an apprenticeship program.

As an industry, trade shops within facilities are varied in size and financial magnitude. Some of our peers have trade shops that are very large and can easily absorb the costs associated with an apprenticeship program. Others are small and can only support the development of one of the two forms of expertise at out disposal-local knowledge. Nevertheless, a scaled-down version of a program that meets the realities of the facilities department is fine as long as the intent is in place. The institution will benefit from a large program as well as a smaller one. Naturally, there are



costs associated with the program that are directly related to its size. In the simplest sense, this is a "cost of doing business." A more detailed question is, what is the overhead or additional cost associated with the program?

There are direct costs that can be clearly charged to a maintenance project. Most apprentices can at least lift, move, secure, and certainly clean-up. Some work requires two people for safety. The hours, and hence cost associated with work performed by the apprentice are directly chargeable under these circumstances to the capital or maintenance budgets. This is the easy part and is largely transparent to the budget office. However, there are blocks of time that are devoted to training or tutelage. Sometimes, the new apprentices are simply third wheels placed on a work team to observe. This is one of the most obvious forms of overhead associated with an apprenticeship program. The cost for this time is ultimately absorbed by the plant department and is handled in one of two ways. Most common is the addition of these costs to the calculation of the skill trade chargeback rates. In other words, each hour of work charged to the maintenance or project account has some small slice attributed to the one or more appren-

tice overhead activities. Once again, it can be argued that this is the cost of doing business in our institutional world. Less typical, but sometimes used, is a cost recovery account funded by the institution. This account is debited with the non-wrench time associated with the program. In this way, the actual hourly charges are not impacted, but the institution as a whole pays. Either option is fine, but requires an acceptance by the finance office on the value and corresponding cost associated with an apprenticeship program.

Some medium to large institutions have placed enough emphasis and resources into their apprenticeship program to necessitate a coordinator position. The logistics of assigning and reassigning trade apprentices on multiple-type projects within the construction and maintenance shops makes a case for this. Clearly a good program has a structured and well-planned sequence of training experiences for the apprentices. Depending on the number of apprentices, the logistics can take some work but are necessary to ensure the completeness and well-rounded nature of the training experience.

At the University of Arkansas for example, Ron Edwards, associate director of operations and maintenance, sees the need to transition apprentices into both construction services and zone maintenance. As Edwards sees it, the construction projects are a good way to get apprentices exposed to their trade in a setting that allows them to both participate and observe. The focus is on the trade skill. At some point, candidates are then rotated into maintenance zones. In this setting, the apprentices are exposed to the maintenance variation of the particular trade and most

Matt Adams is president of The Adams Consulting Group, Atlanta, Georgia. He can be reached at matt@adams-grp.com.

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importantly, the new aspect of customer service. In addition, the apprentices are educated in the second expertise required of a campus skilled tradesperson—local campus knowledge. They learn the unique attributes of the campus facilities. A full rotation from capital projects into zone maintenance overseen by journeyman mentors affords a robust training experience. Too bad, there are still tests at the end!

At the University of Arkansas and other institutions, the question of supply chain management is hot. This is the MBA way to describe the loading of the apprenticeship program so that it produces graduates at a rate that is efficiently absorbed by the trade shops in maintenance and projects. Clearly, too few graduates create skill trade shortages and too many inflates costs. Most of our peers use the “gut feel” approach to sizing and loading the programs. While this will work, it is not easy to impress the vice president for business affairs with this policy. A more empirical, yet basic, approach is to create a table for estimating the output of the supply chain and the demand of the shops. This table would show the apprenticeship process and the stages identified with it-associated durations, drop-out rates, and trade types. Each apprentice is an entry to the table and percolates from one stage to the next and is tracked. We make assumptions about variables like drop-out rates until we have real data from an actual year. Spelling out the most important stages of apprenticeship with the relevant variables gives us a basic supply chain model. It gets tweaked each year as

we learn. On the other side of the equation is the demand for skilled trades. This too is not done by “gut feel” under best practices. Instead, projects and maintenance workload is defined in terms of full-time equivalent skilled trades. Growth or reduction of workload is projected for up to five years. Experiential and predicted attrition is factored into the demand side load. Once again, a simple table or model of skilled-trade demand is compiled and published. These two tables form a mathematical and highly transparent justification for personnel decisions (a.k.a. costs) associated with the apprenticeship program. An added benefit is that the business office can check the math and therefore feel comfortable with our decisions.

The most valuable benefit of an apprenticeship program is the enhancement of “esprit de corps.” In this competitive hiring environment, institutions now struggle to find good staff. Effective apprenticeship programs offer new skills and secure employment to good people. Even better is the cohesiveness and sense of team created by these programs. We have all seen trade shops in our industry where there is a profound sense of pride and achievement. There is an elevated professional standard of care coupled with an identity closely associated with the campus. In the final analysis, there are three legs on the apprenticeship stool—professional trade skills, local knowledge of the campus facilities, and loyalty to the institution. 🏢

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The Bookshelf

Book Review Editor: Theodore J. Weidner, Ph.D., PE., AIA

This is the time of year when facility leaders meet, change positions, and talk about new challenges so it seems appropriate to focus on books about leadership. Whether you are presently a facility leader or aspire to be one, you may want to learn more about either of these books. I found them particularly enjoyable since I joined a new campus, became in charge of the facilities organization, and confronted new realities.

You're in Charge—Now What?

by Thomas J. Neff and James M. Citrin. New York: Crown Business (www.randomhouse.com/crown/business), 2005. 296 pages, hardcover.

You're in Charge is written for the new organization leader; it provides a list of best-in-class examples of what some new leaders have done to get going in the organization and to make a difference. It is interesting to see that there are many different ways to go about getting started in a new job or with a promotion.

One hundred days has often been used as a timeframe to accomplish goals and the authors use this same timeframe as their foundation for long-term momentum and great performance. The first 100 days for every U.S. President is a popular measuring

Ted Weidner is assistant vice chancellor of facilities management & planning, University of Nebraska—Lincoln, Nebraska and president of Facility Asset Consulting. He can be reached at tweidner2@unlnotes.unl.edu.



I was particularly intrigued by some systemic organizational processes which provided the new leader with strategic goals for the organization. The leader didn't necessarily have to come in with his or her own initiatives.

point that the news media likes to focus on. While the level of attention is not the same, a new corporate (or other) leader needs to get off to a good start and the 100-day timeframe seems to work. That does not mean that a leader actually has that much time; sometimes the bar is raised pretty high by the board or supervisor. The book contains examples of what new leaders did prior to entering their current organization. There are examples of trips made to investigate the competition or to find potential best practices; financial records being analyzed to find the weak spots; people posing as a customer to get a non-management perspective. Along with the authors' actionable eight-point plan that will be the foundation for your success, there is also a list of potential pitfalls, the top ten things

not to do; many helpful yet briefly described things to consider. There is no set path to success, i.e., step one, step two, step three, etc. The reader is free to mix, match, omit, or take an extra portion.

I was particularly intrigued by some systemic organizational processes which provided the new leader with strategic goals for the organization. The leader didn't necessarily have to come in with his or her own initiatives. The suggestions of the new organization provided areas to kick-start and watch out for; obviously not for every organization or driven leader.

Overall, I liked this book; it was an easy, pleasant read and provided me with verification of things I was already doing. It also provided me with warnings about acting too quickly or too slowly. Just because I found it pleasant doesn't mean it is a book that is devoid of valuable information to be referenced in the future; it's a good source for ideas and techniques which should remain useful in the future.

If you are new to a job or planning to make a move in the future, you should find this book useful. If you just want to make changes in the organization, it will also be helpful.

Confronting Reality, Doing What Matters to Get Things Right, by Larry Bossidy and Ram Charan. Crown Business (www.randomhouse.com/crown/business), New York: 2004. 260 pages, hardcover.

I purchased *Confronting Reality* with the plan of reading how some executives identified creative ways to redirect and refocus an organ-

ization. After reading the first two chapters I almost gave up on it because there were too many examples that looked like "Chainsaw" Al Dunlap-the notorious executive who out-sourced, sold-off, and eventually ruined Sunbeam. However, persistence rewarded me as I got past the first few cruel chapters.

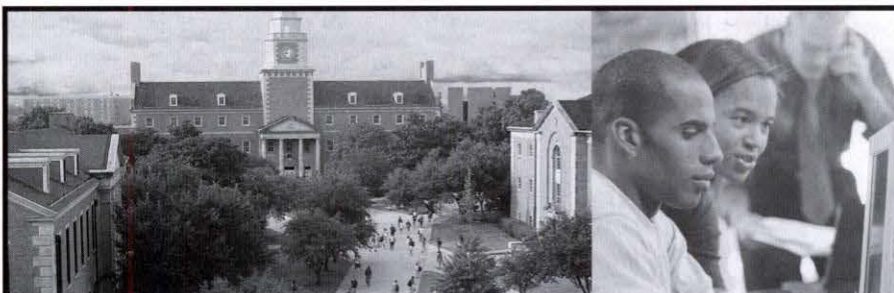
The book returns to a more positive focus by presenting the basic business model-the balance of external realities, internal activities, and financial targets. Each of these areas has components that are adjusted or responded to through an iterative process. Examples are provided that show how an improvement process can begin by focusing on any one of the three tenets of the basic business model and how the other two change in response. Yes, there is the occasional table of numbers, but they are illustrative and not difficult to interpret. There are examples of what

One hundred days has often been used as a timeframe to accomplish goals and the authors use this same timeframe as their foundation for long-term momentum and great performance. The first 100 days for every U.S. President is a popular measuring point that the news media likes to focus on.

happens to those organizations that refuse to change or confront reality-the loss of market share, income, profit margin, and/or internal drive. The book really got interesting when I got to the chapters "Looking Around Corners," "Getting Ready," and "Leading for Reality." There are some great

nuggets of information and processes that I am going to put into practice in the future; I just need time to do all the other things that fill the day.

While I did not like the first few chapters because they focused on outsourcing and elimination of non-core enterprises (an area that facilities departments sometimes fall under), I enjoyed the book and found a number of valuable ideas and examples that I can use. Many of the examples provided were not short-term or early activities which mean to me that this book provides good follow-up for those who have been in a leadership position for some time and are looking for new techniques for improvement. 🏢



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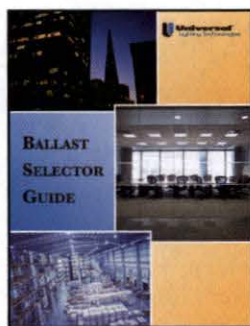
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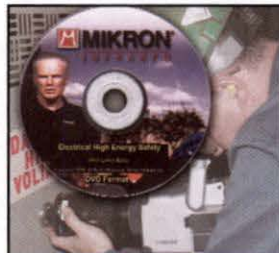
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APPA Events - 2005

Aug 4-6—Educational Facilities Leadership Forum. Orlando, FL.

Sep 18-22—Institute for Facilities Management. Norfolk, VA.

Sep 18-22—Leadership Academy, Track I. Norfolk, VA

Sep 18-22—Supervisor's Toolkit: Nuts and Bolts of Facilities Supervisors. Norfolk, VA.

APPA Regional Meetings - 2005

Sep 11-14—RMA Regional Meeting. Vail, CO. Contact Tommy Moss, 970-491-1060; e-mail tmoss@users.fm.colostate.edu.

Sep 16-21—CAPPA Regional Meeting. Little Rock, AR. Contact David Millay, 501-569-8897; e-mail dllmillay@ualr.edu.

Oct 1-5—PCAPPA Regional Meeting. Tacoma, WA. Contact Craig Benjamin, 253-879-2820; e-mail cbenjamin@ups.edu.

Oct 2-5—ERAPPA Regional Meeting. Atlantic City, NJ. Contact Kevin Herron, 201-569-9500; e-mail herronk@d-e.org.

Oct 8-11—SRAPPA Regional Meeting. Memphis, TN. Contact Jim Hellums, 901-678-2077; e-mail jhellums@memphis.edu.

Oct 9-12—MAPPA Regional Meeting. St. Paul, MN. Contact Tom Dale, 651-962-6530; e-mail tdale@stthomas.edu.

Other Events

Jul 17-20—Ring in Safety: CSHEMA's 2005 Conference. Philadelphia. Call 801-587-2980 or e-mail conferences@guesthouse.utah.edu.

Jul 19-21—Americas' Fire and Security Exposition. Miami. Contact Lorena Solarczyk at lsolarczyk@nfpa.org.

Jul 21-2005—DC Branch Green Industry Professional Field Day and Trade Show. Alexandria, VA. Contact Mary Beane 703-250-1368.

Jul 21—U.S. EPA College & University Sector Second Annual Meeting. Philadelphia. Call 801-587-2980 or e-mail conferences@guesthouse.utah.edu.

Jul 23-27—SCUP Annual Conference. Washington, D.C. Visit www.scup.org.

Aug 1-2—Planning and Management Models for Capital Projects and Facilities Management. San Diego. Contact Bill Nothofer 925-254-1744; bill@trade-lineinc.com.

Aug 9-12—National Collegiate CADD Conference. Ames, Iowa. Contact Lola Van Wyk, 515-294-8313 or visit www.nccconf.org.

Sep 11-13—CMAA's 2005 National Conference & Trade Show. Huntington Beach, CA. Contact 703-356-2662. Event website www.cmaanet.org.

Sep 11-14—APWA International Public Works Congress & Exposition. Minneapolis. Contact American Public Works 800-848-2792 or e-mail ddancy@apwa.net.

Sep 14-16—Preventive Maintenance and Repair of Buildings and Grounds. Madison, WI. Contact Raymond C. Matulionis at 608-263-3372 or matulionis@epd.engr.wisc.edu.

Sep 27-30—Tertiary Education: Surviving or Thriving—Forging the Way in a New Landscape. Perth, Western Australia. Contact Emma Wyse at emma@iceaustralia.com or tem@iceaustralia.com.

Oct 6-8—ACE: Educating All of One Nation. Phoenix. Contact Trenny Stephens 202-939-9395; caree@ace.nche.edu.

Oct 17—Labs for the 21st Century: Energy Efficient Laboratory Design & Operations. Portland, OR. Visit www.labs21century.gov/training/designcourse/schedule05.htm.

Oct 18-21—EDUCAUSE 2005. Orlando. Visit www.educause.edu.

Oct 18-21—ISSA/INTERCLEAN 2005. Las Vegas. Call 800-225-4772 or e-mail info@issa.com.


Oct 18-21—Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision. Las Vegas. Contact Xenia Murphy, 703-684-1446; e-mail Xenia@appa.org.

Oct 18-21—2005 Conference of the Higher Education Facility Managers Association of Southern Africa. Stellenbosch, South Africa. Contact Anna-Marie Van der Merwe at 27 21 8084846 or e-mail avdm@sun.ac.za.

Oct 19-22—ACUHO-I/APPA Housing Facilities Conference. Salt Lake City. Contact April Hicks 614-292-0099; ahicks@astate.edu.

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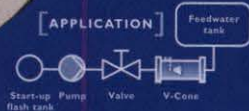
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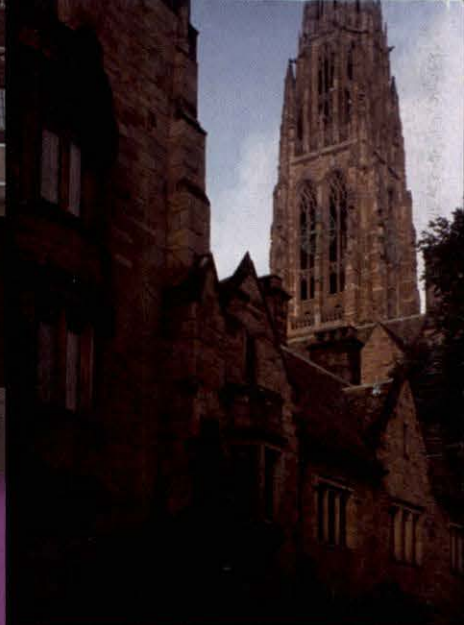
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