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SEPT/OCT 2008

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THE YEAR OF
ENGAGEMENT
WITH PRESIDENT
BILL ELVEY

INSIDE

Photo Highlights
from APPA 2008



Effective and
Innovative
Practices
Award Winners

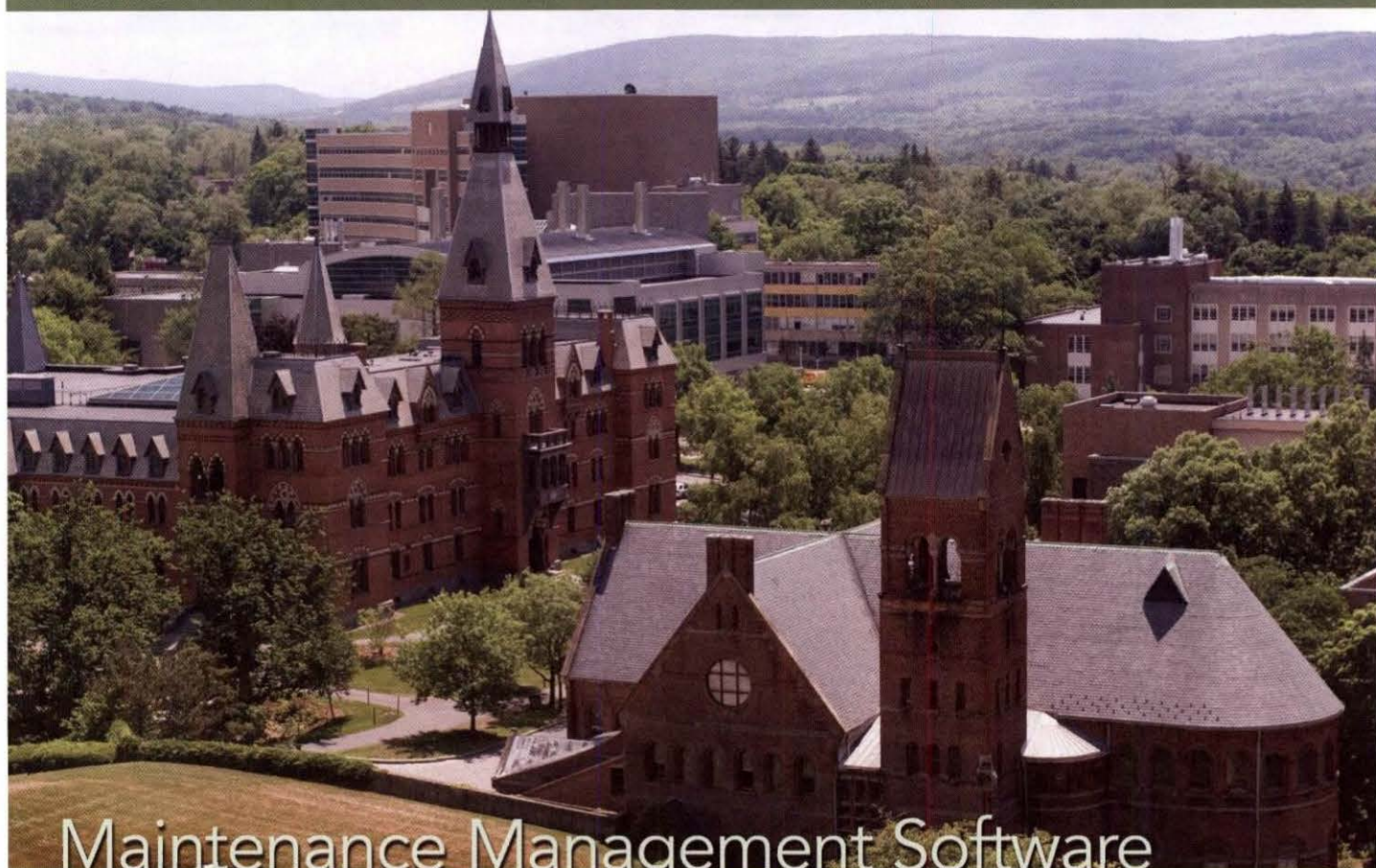
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ENGAGEMENT AND LEGACY: A PROFILE OF PRESIDENT **BILL ELVEY**

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A move from Virginia to Texas comes at the right time. APPA's President brings passion and years of experience to his new leadership role, in which he will focus on furthering the 7 Key Strategies and increasing the level of participation by members throughout the association.

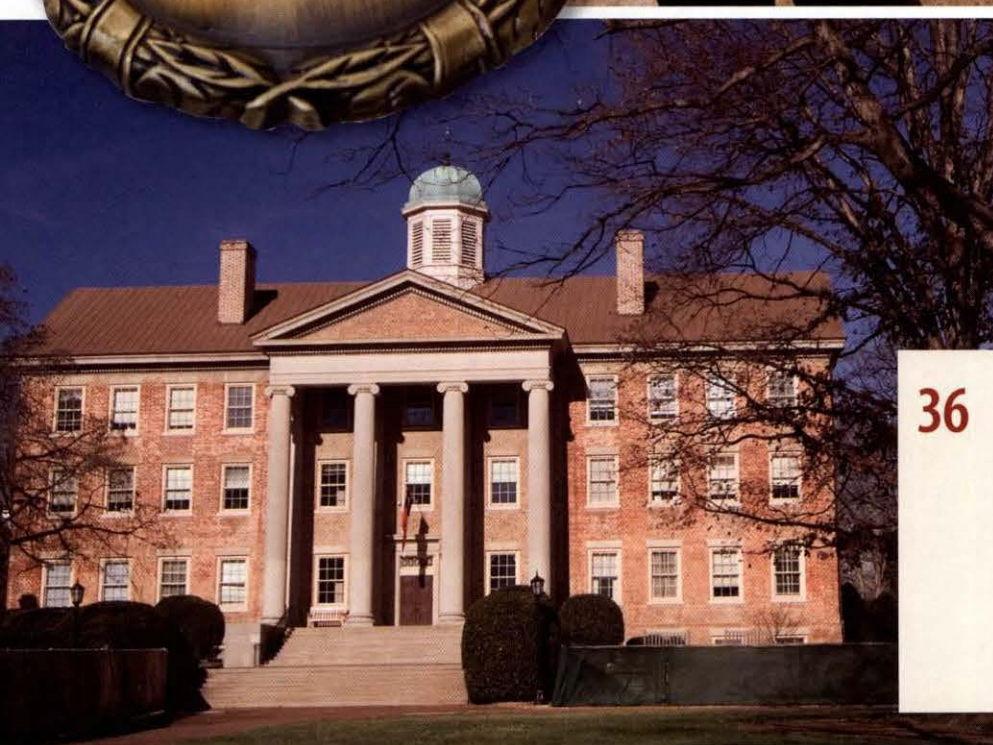
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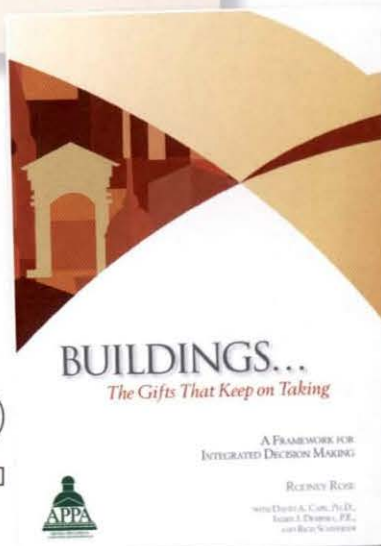




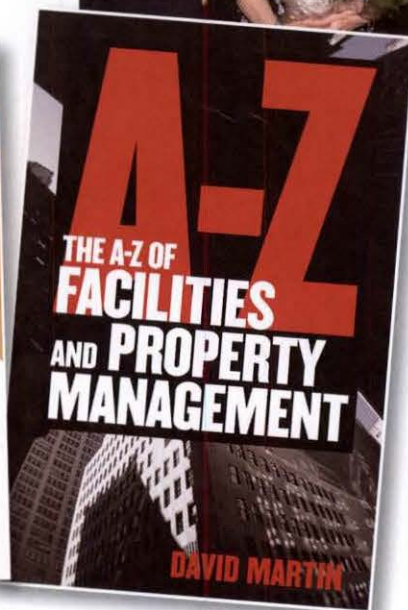
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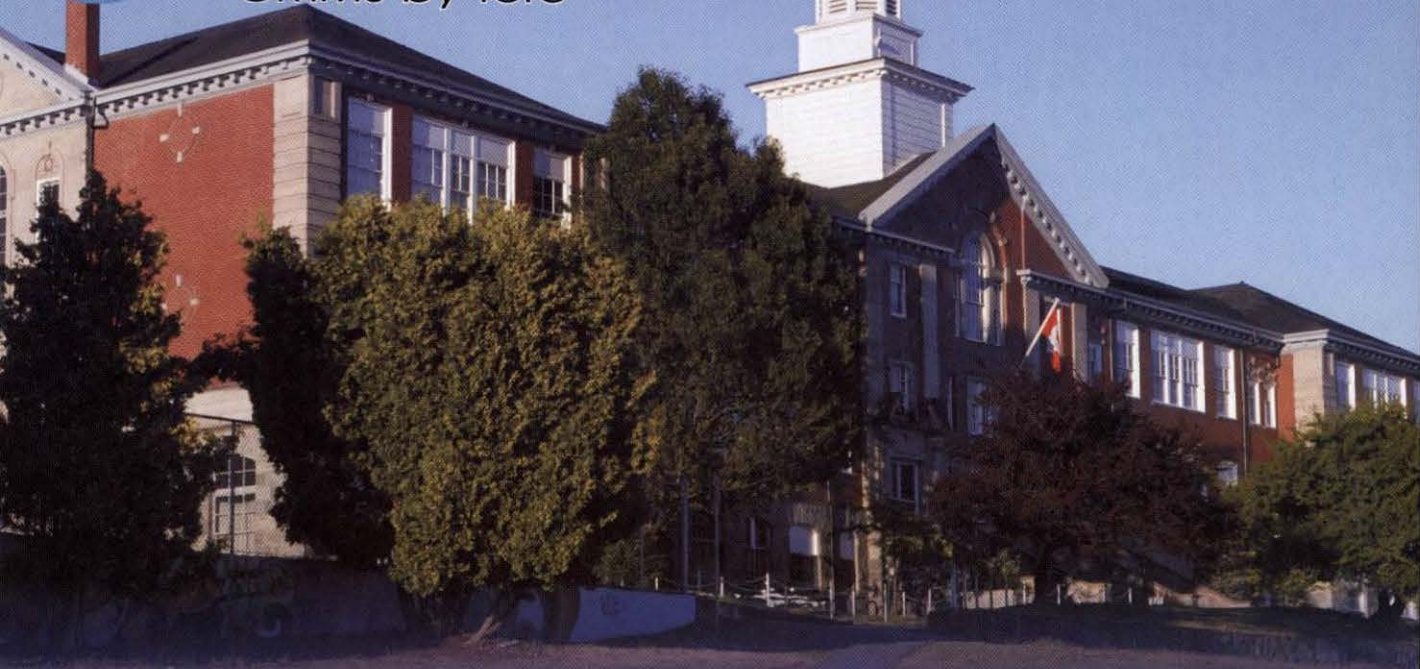


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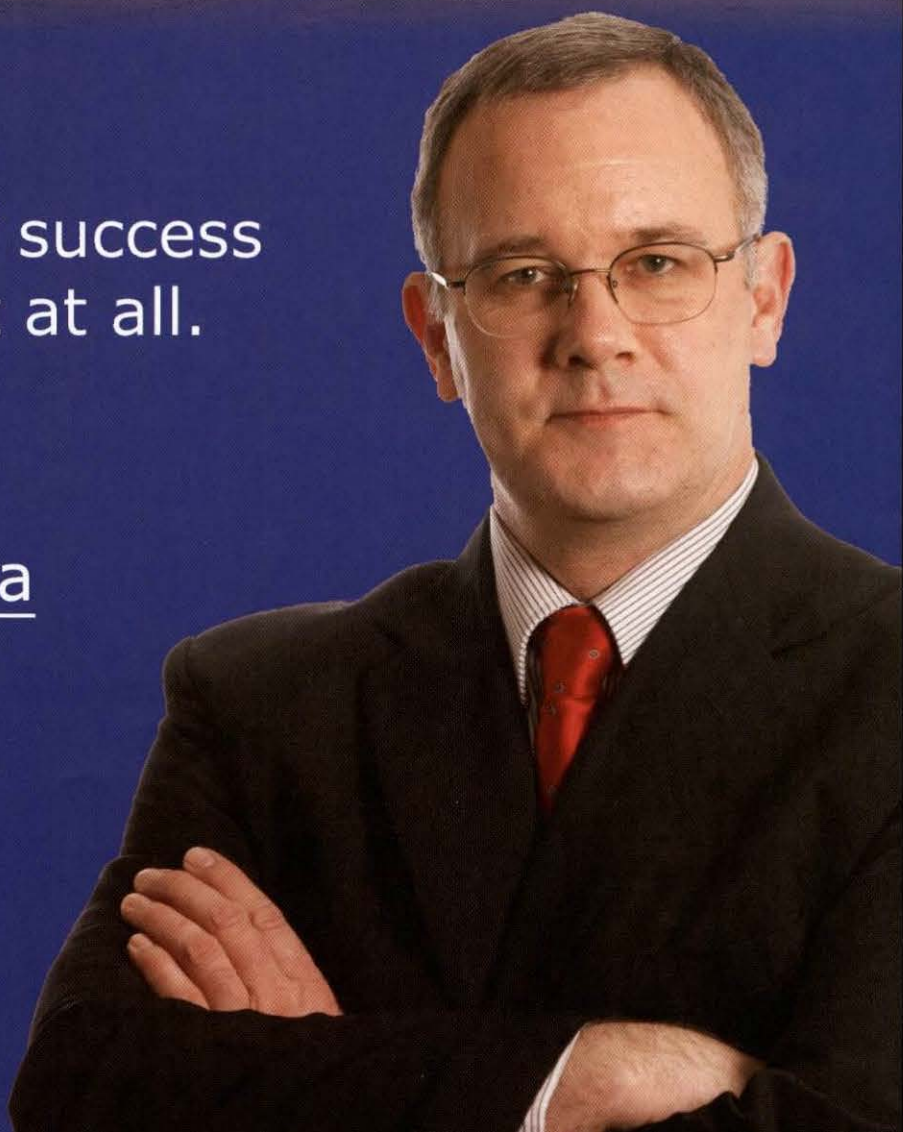


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Thank you to everyone who

participated in the 2008 *Facilities Manager* Readership Survey. We received a healthy return of 859 completed surveys, which reflects a 19.6 percent response rate. Congratulations to the following readers who participated in the survey and whose names were drawn to win these special prizes:

1. Canon PowerShot digital camera: **Dale Walter**, Cornell University;
2. iPod Nano: **John Bachmann**, Purdue University/Calumet
3. \$100 voucher from the APPA Bookstore: **Patrick Buchanan**, George Mason University.

According to the survey results, the typical reader of *Facilities Manager* is male (85.8%), 45 to 54 years old (45.6%), well educated (79.3% are college graduates, and 51.3% have master's or doctorate degrees), and has been involved in facilities management for more than 15 years (62.9%, of which 46.8% have worked in facilities management more than 20 years).

These are just some of the findings of the final 2008 report to APPA by an independent research firm commissioned to assess the value of *Facilities Manager* to our members and other readers.

More than four out of ten readers (45.5%) have director titles, while another 14.4 percent have titles such as vice president, assistant or associate vice chancellor or vice president, or executive director. The other 40.1 percent of our readers are managers, associate or assistant directors, supervisors, and specialists in various areas.

Nine out of ten readers found that the technical level of *Facilities Manager* is appropriate and not too basic or advanced. The top five departments you read most regularly are: Facility Asset

Management (52.7%); New Products (52.5%); Facilities Digest (38.0%); Knowledge Builders (37.1%); and Executive Summary (37.1%).

Regarding our coverage of featured topics, more than half of our readers would like to see more coverage of effective and innovative practices (63.1%); benchmarking (55.6%); and deferred maintenance/modernization/renewal (52.7%). Other article themes requested by readers included new technologies (49.1%); administration and management (47.5%); operations and maintenance (47.4%); sustainability (46.4%);

and campus facilities planning (46.1%).

Finally, we had asked readers to rate *Facilities Manager* in comparison to other regularly read industry and association publications.

We were pleased to see that fully two-thirds of you (75.6%) ranked *Facilities Manager* as the best or one of the top three professional publications that you read and rely upon.

We thank all of you for your continued support of APPA and of *Facilities Manager*, and we look forward to serving you further as your association, and publication, of choice. ☺

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- Technologies
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About APPA

APPA promotes leadership in educational facilities for professionals seeking to build their careers, transform their institutions, and elevate the value and recognition of facilities in education. APPA provides members the opportunity to explore trends, issues, and best practices in educational facilities through research, publications, professional development, and credentialing. Formerly the Association of Physical Plant Administrators, APPA is the association of choice for 5,200 educational facilities professionals at more than 1,500 learning institutions throughout the United States, Canada, and abroad. For more information, visit us at www.appa.org.



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APPA Board Approves Sustainability Statement

At its July meeting in San Antonio, the APPA Board of Directors approved the following statement regarding sustainability and environmental stewardship:

APPA is committed to supporting its members' ability to create and maintain sustainable campus environments.

APPA does this by:

- Facilitating an open exchange of information, knowledge, and experiences regarding sustainability within education facility practices;

- Connecting members to the best available expertise, resources, and information on sustainability;
- Engaging in alliances and collaborative efforts on behalf of its members to continuously improve the ability of educational institutions to achieve a clean and sustainable learning environment;
- Encouraging school, college, and university leaders to embrace sustainability as a core campus value; and
- Employing documented sustainable practices in the conduct of APPA business.

Congress Votes to Fund the Sustainability Efforts in Higher Education

On July 31, the U.S. Congress passed all provisions of the Higher Education Sustainability Act (HESA) as part of the new Higher Education Opportunity Act of 2008 (HR 4137). HR 4137, expected to be signed into law shortly by President Bush, creates a pioneering "University Sustainability Grants Program" at the U.S. Department of Education. It will offer competitive grants to institutions and associations of higher education to develop, implement, and evaluate sustainability curricula, practices, and academic programs.

This is the first new federal environmental education funding program authorized in 18 years. Endorsed by over 220 colleges and universities, higher education associations including APPA, non-governmental organizations (NGOs), and corporations, this grant program will provide the catalyst for colleges and universities to develop and implement more programs and practices

around the principles of sustainability. The bill also directs the Department of Education to convene a national summit of higher education sustainability experts, federal agency staff, and business leaders to identify best practices and opportunities for collaboration in sustainability.

Senator Patty Murray (D-WA), the original Senate sponsor of HESA, explains: "Colleges are a natural breeding ground for the kind of innovation we need to move to new, environmentally-friendly energy sources. Our young people know the stakes. They know that developing sustainable energy programs will affect their lives, their economic well-being, and the planet they are inheriting. These grants will help college students take the reins of the movement to make energy last longer and have less of an impact on our environment."

For more information on the passage and implications of HESA, visit www.fundee.org.

—Written by Jim Elder, director, Campaign for Environmental Literacy, Manchester, MA; e-mail him at elder@fundee.org.

Stewart and Van Sant Win Rex Dillow Award



Patricia Stewart



Kate Van Sant

The Rex Dillow Award for Outstanding Article is an annual award given to the author of the best article published in *Facilities Manager* magazine in the year previous to the annual conference. The recipients of the 2008 Rex Dillow Award are Patricia Stewart of the University of Mississippi and Kate Van Sant of West Virginia University. They were coauthors of the article,

"Pandemic Preparation: Hoping for the Best, Preparing for the Worst," which appeared in the November/December 2007 issue of *Facilities Manager*.

Eligible authors for the Rex Dillow Award are full-time employees of an APPA member institution, and the award is selected by the Information and Research Committee based on a comprehensive rating scale.

This year there were 20 articles eligible for the award, which is named for APPA member emeritus Rex O. Dillow, formerly of the University of Missouri-Columbia. Dillow contributed much to the development and improvement of APPA's publications and educational programs during his active membership in the association.

Stewart and Van Sant were presented their award at the APPA 2008 conference in San Antonio. Congratulations to the authors for their excellent contribution to the facilities profession.

FPI Survey Now Open!

The 2007-08 Facilities Performance Indicators survey is now open and ready to receive your data. The FPI survey has been modified to include an Essential Question Set of executive-level questions that will provide you with valuable strategic measures.

APPA has also introduced its new Qualified FPI Advisor program to assist you in collecting data, clarifying definitions, working with data sources on campus, and understanding the value of your responses as they will relate to the 2007-08 FPI report, which will be published through APPA's website in February 2009.

For more information about the FPI survey or the Qualified FPI Advisor program, visit www.appa.org/research/fpi.cfm or contact Christina Hills, APPA's research specialist, at 703-684-1446 ext. 244 or christina@appa.org. The deadline to complete the survey is Monday, December 1, 2008.



APPA Announces Newest EFP Credential Recipients

APPA congratulates the individuals who passed the Educational Facilities Professional (EFP) exam in July 2008 and received the EFP credential, designating them as a professional proficient in the primary areas of educational facilities management. The credential is earned through a comprehensive examination testing knowledge of four core areas key to the profession: general administration; operations and maintenance; energy and utilities; and planning, design, and construction. Those receiving the EFP designation are:

- J. Thomas Becker, Philadelphia University
- Calvin Bigger, Point Loma Nazarene University
- Roberto Cisneros, University of TX, Medical Branch
- Linda Corbin, Lone Star College, Montgomery
- Eugene Fernandez, Dallas County Community College District
- Johnny Flores, University of TX, San Antonio
- Tonya Foster, Texas A&M University
- Francis Halle, International (Canada)
- Christopher McCall, University of Houston, Downtown
- Kip Oveson, Ridgewater College
- George Parker, Texas A&M University
- Yasuko Sakurai, Texas A&M University
- Ed Schmidt, William Jessup University
- Charles Scott, Illinois State University
- Oscar Villarreal, University of TX, Pan American

The EFP is a way to validate the unique knowledge and competence required of an accomplished professional in the educational facilities field. For eligibility requirements, dates, and to apply for the preparatory course or exam, visit www.certification.appa.org.

Clarifications

In the July/August issue, the photo accompanying the article, "Community Colleges & APPA: Powerful Forces in Higher Education" (p. 44) should have been credited to Northampton Community College.



New educational institution member Ohio County Schools, located in Wheeling, West Virginia, was inadvertently listed as a MAPPA member (p. 9, July/August). While Wheeling is about as far into the Midwest region as is possible to go, Ohio County Schools is a member of the SRAPPA region.

APPA EVENTS – 2008

Sept 7-11 Institute for Facilities Management
Austin, TX. www.appa.org/training/institute/index.cfm

Sept 7-11 Supervisor's Toolkit Austin, TX.
www.appa.org/training/toolkit/index.cfm

Sept 12 EFP Prep Course Austin, TX.
www.certification.appa.org

Sept 12 or 13 EFP Exam Austin, TX.
www.certification.appa.org

Sept 28-Oct 1 ERAPPA Annual Conference
Baltimore, MD. www.erappa.org

Sept 28-Oct 1 RMA Annual Conference
Park City, UT. www.rmappa.org

Oct 5-8 MAPPA Annual Conference
Madison, WI. www.m-appa.org

Oct 8-10 PCAPPA Annual Conference
Portland, OR. www.pcapa.org

Oct 8-11 ACUHO-I/APPA Facilities Housing Conference Dallas, TX. www.acuho-i.org

Oct 11-15 CAPPA Regional Conference
Oklahoma City, OK. www.cappaedu.com

Oct 25-28 SRAPPA Annual Conference
Charleston, SC. www.srapa.org

Nov 6-7 AAPPA 2008 Fall Education Conference
Halifax, NS. fm.dal.ca/aappa

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

OTHER EVENTS – 2008

Sep 21-24 National Recycling Coalition Conference Pittsburgh, PA. www.nrc-recycle.org/2008callforpapers.aspx

Oct 5-7 Building Commissioning Association Annual Convention Long Island, NY. www.bcx.org/events/expo2008

Nov 2-5 National Association of College Auxiliary Services Conference Chicago, IL. www.nacas.org

Nov 4-6 Global HR Forum Seoul, South Korea.
www.ghrforum.org

Nov 9-11 AASHE National Conference Raleigh, NC.
www.aashe.org/conf2008

Nov 19-21 Greenbuild 2008 Boston, MA.
www.greenbuildexpo.org

Jan 7-9 Texas College and University Facilities Conference San Marcos, TX. www.vpfss.txstate.edu/tcuf/default.htm

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



Leadership Defined and Refined

By E. Lander Medlin

As educational facilities professionals supporting the education industry sector, we certainly understand the value of education as an investment in one's individual growth. Indeed, our product – education – changes lives and gives individuals an opportunity for a better future. The facilities we build, operate, and maintain are an important part of the overall student experience. Thus we make an enormous difference for our institutions. But our education should not stop with the attainment of a college degree! That is just the beginning of the learning experience. And this is where APPA can assist you throughout your professional career. Those of us who attended the APPA 2008 conference certainly expanded our learning horizon beginning with the five world-renowned general/pleinary speakers and extending throughout the full breadth of the breakout sessions. This year's educational program was the best ever delivered by international APPA, so the insights of these five speakers are well worth repeating.

John Maxwell clearly has a passion for leadership having spent his entire life studying leadership principles and their application. Maxwell emphasized that everything rises and falls on leadership. Countries are more competitive and collaborative, organizations are more productive, and individuals are more effective and successful by any set of tangible and intangible measures. He defined leadership as simply the ability to influence people. He stressed that these skills can be developed and honed with daily applica-

tion and active engagement and will give you a competitive edge. By actively listening to and learning from those you lead, you ensure you are leading by connection rather than leading by assumption. Further, Maxwell delved into the five levels of leadership beginning with "position" and the rights bestowed by the organization, and ending with "personhood" and the respect bestowed by those with whom you work. Clearly leadership is an active engagement in building relationships, increasing connections, and producing results. But it is also about making a daily investment in yourself and others. What are you doing daily to invest in yourself and others? Make a plan today.

James Kouzes, co-author of *The Leader's Legacy*, provided insight on how a leader develops his or her legacy, and why it is so important to the lifeblood of the organization. His premise is that leadership is personal. Kouzes stressed that people in your organization should know who you are, what you care about, and why they ought to follow you. This premise served as the basis for his five sustainable leadership lessons:

You are the most important leader in your organization, so your responsibility as a positive role model and creating a personal connection with your staff is critical.

Your own values, beliefs, and principles must be as clear as those of the organization you lead.

You should be forward-looking, ensuring clarity of the organization's vision and its future.

It takes courage to make a life. He emphasized that adversity reveals character; it does not build it.

The legacy you leave is the life you lead. And, your legacy is someone else's future. He quoted Albert Pike who said, "What we have done for ourselves alone dies with us...what we have done for others and the world remains and is immortal."

Kouzes concluded by emphasizing the key skill of the better leader is their ability to learn. What are you doing every day to learn and grow your leadership skills?

Don Tapscott, author of *Wikinomics*, spoke about the technology revolution and posits the new Web 2.0 is fundamentally changing the way we orchestrate society; the role of the university; our approach to managing facilities and procuring things; and in general, causing us to rethink pedagogy and learning. In essence, the physical and digital worlds are coming together to dramatically streamline processes and allow new business models to take shape. People and their approaches to the workplace are changing dramatically too. To the "net" generation, technology is ubiquitous, thereby changing their frame of reference as they enter the workplace. They want freedom of choice seeing everything as customizable. They are scrutinizers with high integrity. They operate in highly collaborative ways, are extremely innovative, and work at a very fast pace. This generation sees the Internet as a huge force for change. This age of collaboration has spawned a social revolution where the Internet is about building community *not* transmitting information and content.

We are living in a time of self-organization and mass collaboration – that is the new competitive space. The key for today's leaders will be how one harnesses that collaborative energy. The implications for education are enormous in this new age of highly individualized, consumer-driven

participation and engagement. However, education must change to remain effective and relevant. Tapscott closed with a quote from Victor Hugo, "Nothing is so powerful as an idea whose time has come." Will not education need our best leadership?

Marcus Buckingham referred to a number of his books especially his new work *GO Put Your Strengths to Work* where he stresses the importance of building on your strengths and managing around your weaknesses. He provided data to support his claim that great organizations deliberately accumulate, grow, and develop great teams. These great teams are made up of people who focus on their unique strengths and contribute those individual strengths in engaged, focused, productive, and deliberate ways. As he deconstructed these bold statements, he encouraged each of us to consider whether we have the opportunity to do what we do best every day at work.


When organizations encourage people to focus on their strengths, the data clearly demonstrates their people show up regularly, have fewer accidents and are more productive and profitable. Further, the data supports the view that expectations are clearer, recognition means more, development seems appropriate, alignment occurs, and the organization is more productive. Unfortunately, most organizations are good at gap analysis or "gap-finding" not "gift-finding." Since our core personality traits don't change that much as we age, and we grow most in our areas of greatest strengths, our most productive contribution to the workplace and our colleagues and teammates should be to willingly volunteer those strengths to the team when they are needed, rather than putting one's strengths aside and doing whatever it takes to help the team. In fact, this type of martyrdom won't help the team; it will only serve to undermine it. Ultimately, if you focus on your strengths and how you can contribute them each and every day, you will be more resilient, more productive, and more effective; everyone will win when you do. So, will you choose a strengths-based approach to

life and living and give yourself the chance to express your best self?

Finally, **Stephen M.R. Covey** focused his presentation on "The Speed of Trust." He helped us put on our "trust glasses" so we could see the relevance and pervasive impact of trust – its nature, tools, and processes. This allowed us to


see dividends as a leader and do something to build and grow trust in our organizations. He also provided facts and data on such trust realities as trust being a hard-edged economic driver, and that there is nothing as fast as the speed of trust. He stated that trust is the currency of the new economy. The ability

(continued on page 56)



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Meet the Code Advocacy Task Force

By Kevin Folsom

The APPA Code Advocacy Committee started in 2004 with Brooks Baker. Since then the Code Talkers column was created, numerous articles have been published, and APPA members are beginning to see the power that APPA has to influence codes that affect their institutions.

The APPA Board of Directors approved funding for the initiative to carry on another three years, and formalized a committee now known as the Code Advocacy Task Force (CATF). "Task Force" is used because we are soliciting experts in a specific area of our industry to serve on the group rather than emphasizing regional representation at this time. Following is a brief introduction of each CATF member:

Mike Anthony, University of Michigan: has been involved since 1999 in code issues with NEC and NFPA on behalf of APPA. He has contributed numerous articles to Code Talkers and written two books for the industrial electrical industry.

Richard Davis, Evergreen State College: background in code work – was in K-12 in late 1980s and 1990s. Did utility

tariff work in Southern California. Formed alliance with school districts to grandfather old schools. Currently on technical advisory committee on administrative electric codes. Works a lot with elevators as well and compliance with state codes in Washington. Is also an attorney. Member of Washington State Bar Association Understands construction law. "It's not only that we regulate, it's HOW we regulate." Need correlation between regulations and the purpose of those regulations. Need more clarity on the reasoning behind regulations and who is in authority.

David Handwork, Arkansas State University: has been in higher education facilities for six years. He came from private industry, where OSHA is everywhere. Active with ASHRAE and technical committees providing the educational facility perspective. ASHRAE has a significant impact on higher education because it can save or cost us a lot of money depending on what they institute.

Terri Konchesky, West Virginia University: is a code specialist. Works in safety and codes. Is a liaison between the university and state fire marshal. Sits on campus fire safety board. Member of NFPA and involved with Fire Watch and the *Campus Fire* newsletter. She works with NFPA, ASHRAE, some OSHA, deals with architects, engineers, and contractors to ensure compliance with codes and specs.

Brooks Baker, University of Alabama/Birmingham: started in health-care and has first-hand knowledge in the creation of codes and standards in that industry. His involvement has been trying to keep them from being too restrictive, while preventing manufacturers from driving code development/implementation to benefit themselves. Past APPA President.

John Bernhards, APPA Staff: began with APPA in January 2008, and has

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As you can imagine, the APPA Code Advocacy Task force has a tall order to fill related to the development of all codes that affect educational institutions. They may be a long time getting that accomplished, but you can rest assured they have a strategy:

1. Create a codes portal through the APPA website giving access to all codes for all member institutions. We're currently in the design process with bidding developers.
2. Identify all the standards writing bodies that affect codes for education while monitoring their activity. We currently have a list of 12.
3. Chose the top ten codes that need APPA's influence during the in public comment period, then provide representation. There are seven that need


In the May/June Code Talkers column a typographical error transformed 11'-0" into 110" as the minimum width for van accessible parking spaces under the proposed new ADA Standards. The same type error made the 5'-0" minimum width for an access aisle look like 50". Designers should be careful to recognize that the proposed Standard still requires the same 16'-0" of total width that is required by the Current ADA Standards. The new version simply offers the option of 11'+5' or 8'+8'. The editor regrets the error.

As an update, the U.S. Department of Justice released the proposed new standards and regulations in June. They and other documents developed with the Proposed Rule may be downloaded from www.ada.gov/NPRM2008/ADAnprm08.htm.

- comments within the next few months.
4. Solicit more articles for the Code Talkers column to educate members and the industry.

How can you help? For starters, we need volunteers in the following areas:

1. If you serve on any kind of technical committee that provides standards writing support, let us know.

2. If you serve on any kind of codes governing body, let us know.
3. Write articles for Code Talkers in areas that you are knowledgeable. 

Kevin Folsom is director of facilities and plant operations at Dallas Theological Seminary, Dallas, TX, and APPA's vice president for professional affairs. He can be reached at kfolsom@dts.edu.

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Engagement and Legacy

A PROFILE OF PRESIDENT BILL ELVEY

By Alan Dessoiff



Top: Elvey & President-Elect Polly Pinney at the SFO Summit. Bottom: Alan Bigger passes the presidential gavel to Elvey at APPA 2008.



When Bill Elvey became APPA's new President at the association's conference in San Antonio in July, he was at home in more ways than one. A native Texan, he grew up in San Antonio and met his wife-to-be there—in the seventh grade. Last fall, after an absence of 31 years, he came back to Texas as director of facilities management at the University of Texas at Dallas (UTD), a young, dynamic research institution on the cutting edge of science, technology, medicine, business, and the arts.

Bill Elvey is at home in APPA, too, where his years of active involvement in the association, combined with his extensive career experience in the public and private sectors, the last 11 in higher education, have prepared him well for the top leadership post. Now he is embarking on responsibilities that he hopes will help keep APPA, like UTD, on the cutting edge—in this case, of changes in the profession as well as in APPA itself.

"There is no doubt that facilities management is changing and the rate of change is increasing. It is ten times more complex today than it was even ten years ago," Elvey says, citing technology as an example. "The use of technology has had a tremendous impact on teaching and education. As professionals, we have to incorporate that technology into our facilities and we have to know how to do it right."

Facilities managers also are aware of increasing attention being paid to sustainability and "hopefully have a philosophy of incorporating sustainable practices in their work," he continues. "The pressures to do that are greater today than they were even just five years ago."

The current condition of the economy and its impact on educational facilities management does not unduly concern Elvey. "I've been around long enough to know that it's cyclical in nature," he says. "Most of us feel that we'll never have enough resources to do everything we want to do, so typically we're all very good at identifying and prioritizing needs and efficiencies and making sure we're always addressing the most important ones. We're pretty good at working in an under-resourced environment so I wouldn't expect that to change. I tell my facilities team that it may not always be possible to do more with less—there are, after all, limits. However, in the spirit of continuous improvement, we should always be able to *do more differently*."

APPA's own financial position "has historically been a source of great strength and pride and this continues to be the case today," Elvey says, and he wants to keep it that way. "I cannot in good faith bring forth a new program or initiative that will only serve to undermine the sound fiscal management currently

in place," he says, asserting that he will work with APPA's Board and executive staff to present a balanced budget "if at all possible" for the 2009-2010 fiscal year.

An issue that concerns Elvey and underscores his presidential goals has to do with people. A large number of the people in facilities management positions at educational institutions, both in trades practices and in administrative positions, are "senior folks" who will be reaching retirement age in the next ten years, he says, and it's vital to recruit, train, and retain young professionals to succeed them.

Similarly, in APPA itself, although "we have a lot of people who are actively involved and understand the values and benefits of their membership," there are others who do not, Elvey says. "There are members who perhaps don't take advantage of the opportunities as much as they should," he asserts.

THE YEAR OF ENGAGEMENT

Elvey has determined that the theme of his term as President will be "engagement." That means "reaching out to younger professionals" to become more involved in APPA and also "keeping our senior facility officers engaged, since they are the leaders of the profession and can help us with the training and development of their successors and younger professionals."

"It's really up to us," he declares. "Are we going to actively participate in the activities of APPA or not? Only through the collective engagement of every member at every level of the organization can we seek to transform APPA into the association that we all want it to be: an association serving its members the



way they want to be served; an association helping to focus and prioritize the delivery of programs and services with a sense of urgency and attention to detail that can surely lead to a successful and great association for many years to come."

As he begins his term as President, Elvey believes APPA is "doing quite well." In the third year of implementing its 7 Key Strategies, the association has made "tremendous progress" on three of them, including rebranding. By dropping "higher education" from its tag line, the association is moving actively to recruit members from within the community college and K-12

sectors because “they face many of the same challenges that higher education facilities managers face,” Elvey says.

He hopes that professionals from those sectors will join “the very capable individuals we already have at all levels who are continuing to improve APPA and its delivery of programs, products, and services. In the spirit of continuous improvement, we’re going to continue to move it forward and make sure we can be flexible and meet the needs of our members as the environment changes around us.

“The Year of Engagement means that as members of APPA,

it is our shared responsibility to inspire, motivate, persuade, and cajole our currently unengaged members or potential future members to become engaged in APPA at any level,” Elvey says.

A FOUNDATION IN EDUCATION

Before returning to Texas to take the position at UTD, Elvey spent ten years at Virginia Tech in Blacksburg, Virginia as assistant vice president of facilities and director of physical plant. At Virginia Tech he managed an operating budget of \$98 million and a workforce of more than 600.

“Bill had an area of huge responsibility and never let me down,” says Kurt Krause, who, as vice president for business affairs, was Elvey’s direct reporting senior for three years at Virginia Tech. “He demonstrated his professionalism from the first day I met him. We became wonderful partners and developed a great friendship. His staff enjoyed working for him. They knew his vision, where he wanted to go, and how he wanted to go there,” Krause says.

Elvey was introduced to APPA when the university hosted a conference of the Southeastern Region of APPA (SRAPPA) in Roanoke. At the time, Spencer F. Hall, assistant vice president for facilities at Virginia Tech and Elvey’s immediate supervisor for five years, was in line to become regional President. “But I decided that I wouldn’t be in the business forever and Bill ought to be the one to get into the loop,” relates Hall, who retired from Virginia Tech in 2003.

So Elvey became SRAPPA President and began his active involvement in the wider APPA organization. His other professional affiliations include the American Society of Civil Engineering, the American Public Works Association, and the American Society of Military Engineers.

“I think Bill is a great guy. He’s an outstanding manager and an outstanding individual, too,” Hall says.

Elvey was at Virginia Tech when the tragic shootings that claimed the lives of 32 students and faculty on campus on April 16, 2007, captured the attention of the nation and the world. “I had a great team at Virginia Tech and I am very proud of our response and our recovery operations and everything we did to help the university restore normality as quickly as possible,” he says.

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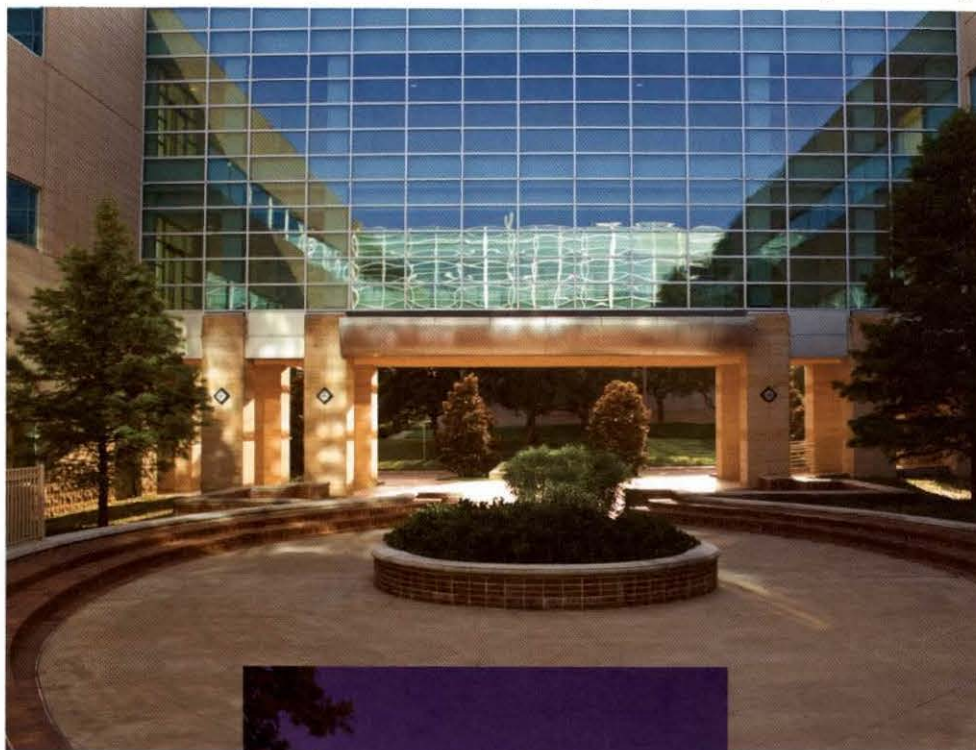


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Top: UTB's Erik Jonsson Engineering and Computer Science Building. Bottom: School of Management Building



A key lesson for facilities managers that he learned from the experience, he continues, is that "we can never be complacent. We must always be prepared for anything that could happen."

That means having in place and practicing an emergency management plan that addresses "all potential scenarios, not just weather-related incidents or hazardous chemical spills, things of that nature."

In his short time so far at UTD, "we already have conducted a tabletop exercise" in emergency facilities management in conjunction with the University of Texas System, Elvey says. In addition, Elvey has been appointed as APPA's representative to the National Campus Safety and Security Project, a new research initiative led by the National Association of College and University Business Officers.

ENGINEERING AND THE NAVY

Elvey graduated from Rice University in 1976 with a Bachelor of Science



degree in environmental engineering and received a Master of Environmental Engineering degree from Rice the next year. In 1996, he earned a Master of Business Administration degree from George Mason University. He is also a registered professional engineer.

Before entering higher education facilities management at Virginia Tech, he spent 20 years in various positions in the U.S. Navy Civil Engineer Corps, starting in the customer service department at the Naval Submarine Base in Bangor, Washington and ending as director of business management in the Public Works Directorate in the Naval Facilities Engineering Command in Alexandria, Virginia. There, he programmed, budgeted, and allocated resources for a \$2 billion per year, 14,000-person

APPA's

7 KEY STRATEGIES

to promote leadership and growth in educational facilities management.

1. Develop and execute a "brand" initiative.
2. Develop and implement an enhanced website to become the "go to" resource for facilities questions.
3. Expand research to build credibility and visibility by senior institutional officers.
4. Engage in symbiotic and collaborative partnerships.
5. Engage young facilities professionals.
6. Provide targeted cutting-edge educational programs.
7. Establish credible and valued credentialing programs for individuals and institutions.

organization consisting of ten Navy Public Works Centers worldwide and the Naval Facilities Engineering Service Center in Port Hueneme, California.

"I have done a lot of things. I have traveled all over the world and worked in a number of diverse environments, with different people in terms of their cultures, backgrounds, and experiences. One thing I have learned that has helped me grow professionally is to be flexible and able to adapt quickly to changing situations," Elvey says.

A LEADER'S LEGACY

Elvey says he had decided to move to UTD from Virginia Tech before the tragedy there and it did not change his plans. "In some respects, I'm sorry I left. On the other hand, coming back to Texas allowed me to align my personal desire to be closer to my family and my wife's family with my commitment to devote more time to APPA and give back to my profession. This is a



Bill and Deborah Elvey

great time for me personally and professionally," says Elvey.

His wife, Deborah, is a teacher and they have three daughters, all college graduates. In his spare time, Elvey says, he likes to "jog, play golf, and do projects around the house." He hopes to become as involved in community activities in the Dallas area as he was in Blacksburg, but for now he's just "glad to be back in

Texas, be able to stay in higher education at an emerging tier-one research university, be closer to family, and very happy to be able to give back to my profession through APPA."

Elvey says he was "lured" to UTD by Rick Dempsey, assistant vice president for facilities management. "He's a facilities professional of the highest order. He knows the business and he's able to make things happen," says Dempsey who, it happens, also was raised in San Antonio. "So we have a connection there," says Dempsey. "We both have come home."

Elvey recounts that when he was President-Elect, APPA Executive Vice President Lander Medlin had asked him to start thinking about his legacy as President. "I don't typically think

about such things," he says, "but ever since that brief conversation, I have tried to do some really deep thinking about the subject. Then I read the book *A Leader's Legacy* by Kouzes and Posner, and I personally agree with the points they made.

"Their message is that the legacy you leave is the life you lead. I may never know what changes we might initiate within APPA this next year and what impact they might have. I may never know when that critical moment might come. But what I do know is that my legacy may be nothing more than just the satisfaction of knowing that I will try my very best to leave APPA a better organization than before the time that I became President.

"So," says Elvey, returning to his theme of engagement, "I strongly encourage everyone to actively participate in APPA. ☺"

Alan Dessoiff is a freelance writer based in Bethesda, MD, and a frequent contributor to *Facilities Manager*. He can be reached at adedit@verizon.net.

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APPA 2008

Conference Highlights

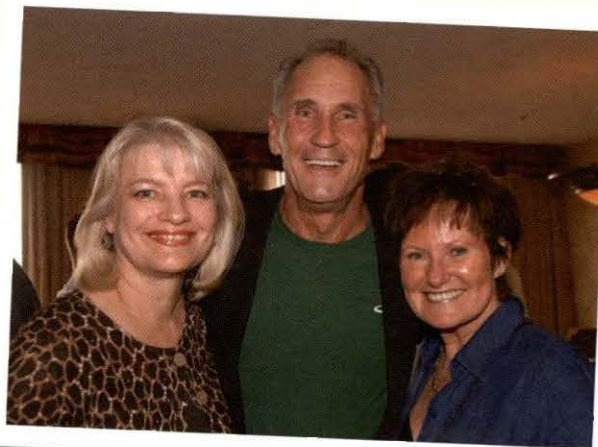
The Rise to Greatness • July 9-11, 2008 • San Antonio, Texas

Compiled by Steve Glazner • Photos by Rhonda Hole

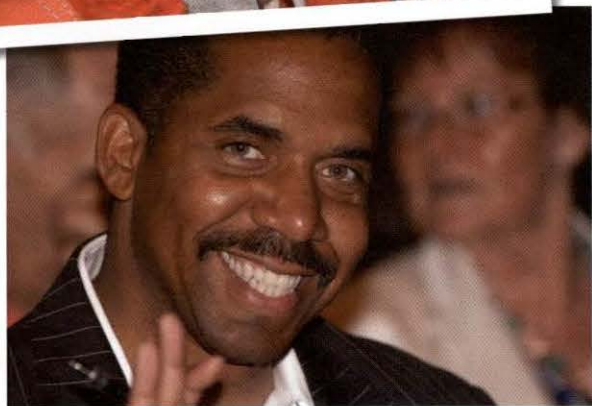


Armadillo races brought out the competitive spirit

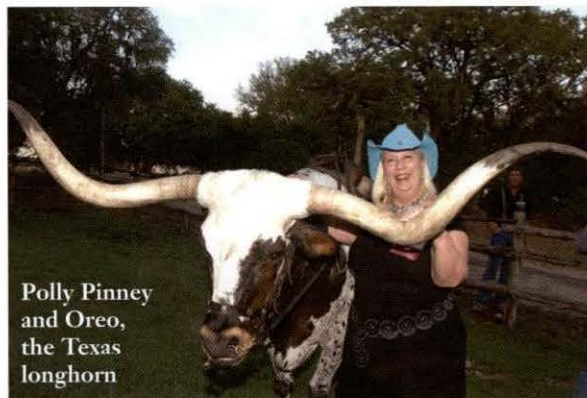
Thank you from the Professional Development Committee and the APPA staff to everyone who participated in the 2008 SFO Summit and the APPA 2008 conference. View all the exciting moments on our online photo album at <http://2008appasanantonio.shutterfly.com>.



Brenda Colby, Dave Millay, and Maggie Kinnaman



Daniel Grissom



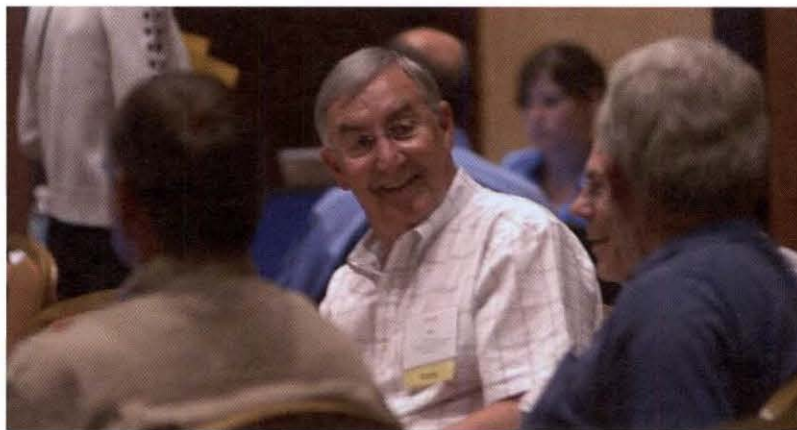
Polly Pinney and Oreo, the Texas longhorn



TMA Fun Run

SFO Summit

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Sharing a story at the Summit



Mary Vosevich



Jack Colby



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Hall of Resources

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Sessions & Networking

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Master Trainer Nancy Yeroshefsky, left, and July 2008 Supervisor's Toolkit participants



Keynote Speakers

The Rise to Greatness • July 9-11, 2008 • San Antonio, Texas

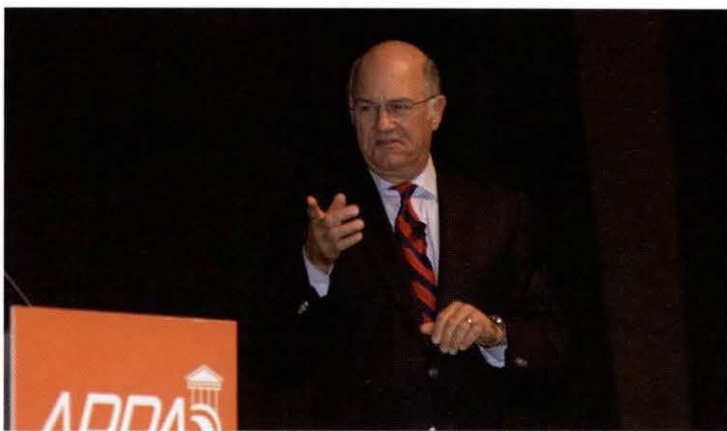
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Marcus Buckingham



Stephen M.R. Covey



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Don Tapscott

2008 Awards

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PRESIDENT'S AWARDS



Chris Ahoy, Iowa State University



Jeff Campbell, Brigham Young University



Jim Haley, Miami University

CFaR RESEARCH AWARDS



Mike Sofield, left, presents the CFaR Research Award to Alan Bigger and Jeff Campbell



The CFaR Student Research Award was given to students at Brigham Young University (Jeff Campbell, advisor)

2008 Awards

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MERITORIOUS SERVICE AWARD



Darrel Meyer, Metropolitan Community College of Kansas City

PACESETTER AWARD



Kevin Folsom (far left) and Alan Bigger (far right) present the Pacesetter Award to Willy Suter, Jeri King, Terry Major, Bob McMains, and Brian Wormwood. *Not pictured:* Tommy Moss

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STV Architects
TACO Inc.
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TMA Systems
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VDA - Van Deusen & Associates

REX DILLOW AWARD



Mike Sofield, center, presents outstanding article award to Kate Van Sant (accepted by Joe Fisher) and Patricia Stewart

OUTGOING VICE PRESIDENT AWARD



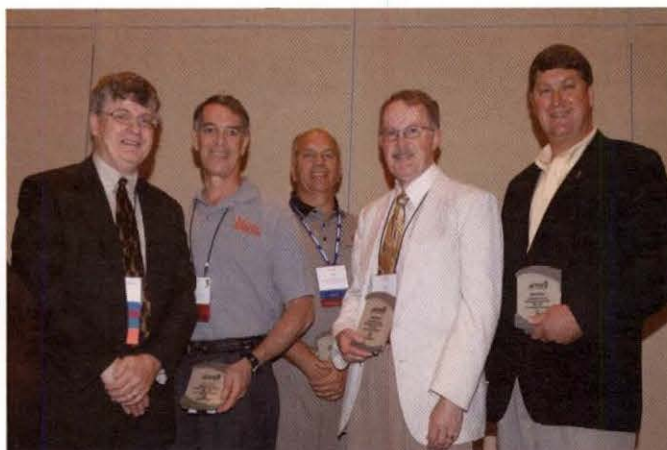
Polly Pinney, outgoing Vice President for Professional Development



Mike Sofield, outgoing Vice President for Information and Research

OUTGOING SENIOR REGIONAL REPRESENTATIVES

Alan Bigger honors Glenn Smith, Greg Fichter, Joe Fisher, and Darrel Meyer.
Not pictured: Scott Burns and Tommy Moss



2008-09 APMA BOARD OF DIRECTORS

From left, Keith Woodward, Willy Suter, John Greene, Jerry Carlson, Dave Millay, Nancy Hurt, Bill Elvey, Polly Pinney, David Gray, Randolph Hare, Eakle Barfield, Kevin Folsom, Mary Vosevich, and Dan Whitezell.
Not pictured: Alan Bigger, Marion Bracy, Ron Brooks, Buzz Nelson, Fred Plant, and Tony Valenzuela

2008 Awards

The Rise to Greatness • July 9-11, 2008 • San Antonio, Texas

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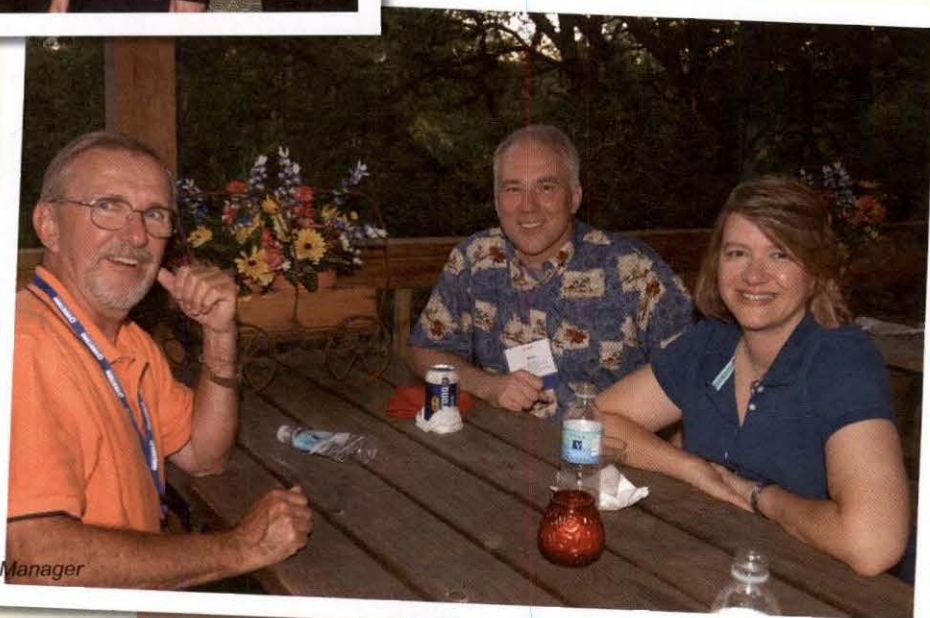
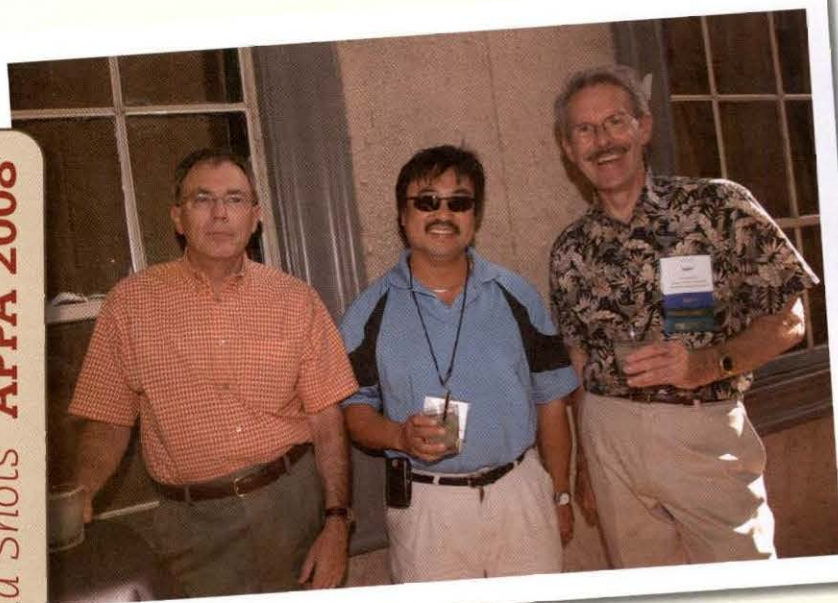


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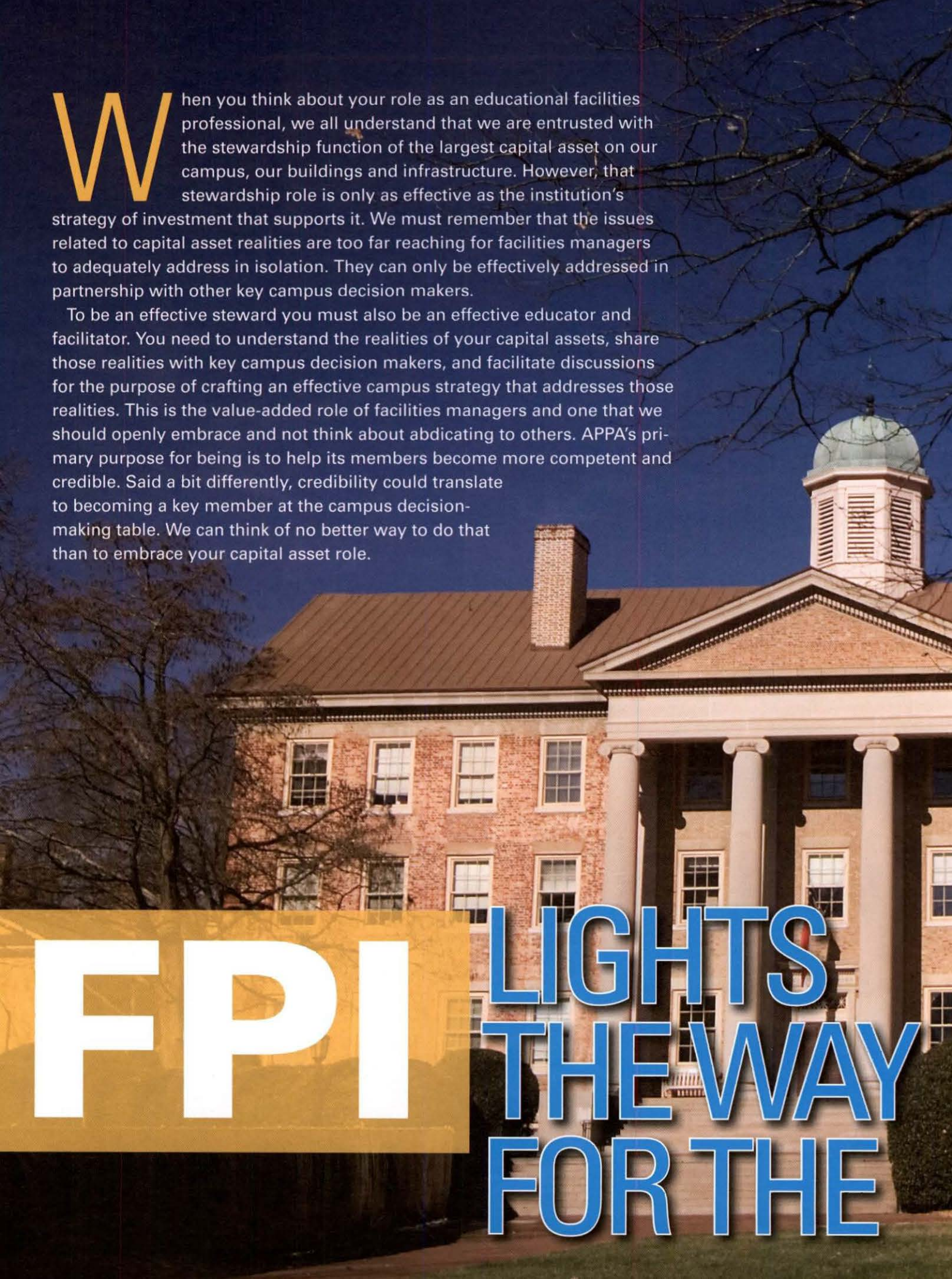
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Westminster College, MO

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J.D. Thompson
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Jerry Wilde
Cal State University
Chancellors Office, CA



When you think about your role as an educational facilities professional, we all understand that we are entrusted with the stewardship function of the largest capital asset on our campus, our buildings and infrastructure. However, that stewardship role is only as effective as the institution's strategy of investment that supports it. We must remember that the issues related to capital asset realities are too far reaching for facilities managers to adequately address in isolation. They can only be effectively addressed in partnership with other key campus decision makers.

To be an effective steward you must also be an effective educator and facilitator. You need to understand the realities of your capital assets, share those realities with key campus decision makers, and facilitate discussions for the purpose of crafting an effective campus strategy that addresses those realities. This is the value-added role of facilities managers and one that we should openly embrace and not think about abdicating to others. APPA's primary purpose for being is to help its members become more competent and credible. Said a bit differently, credibility could translate to becoming a key member at the campus decision-making table. We can think of no better way to do that than to embrace your capital asset role.

FPI

**LIGHTS
THE WAY
FOR THE**



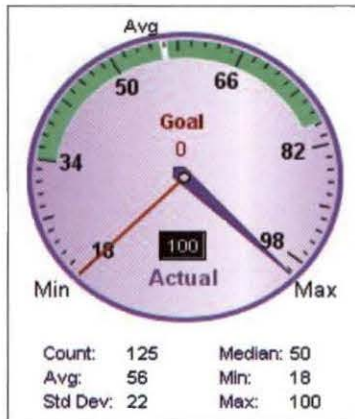
UNC SYSTEM

By Maggie Kinnaman

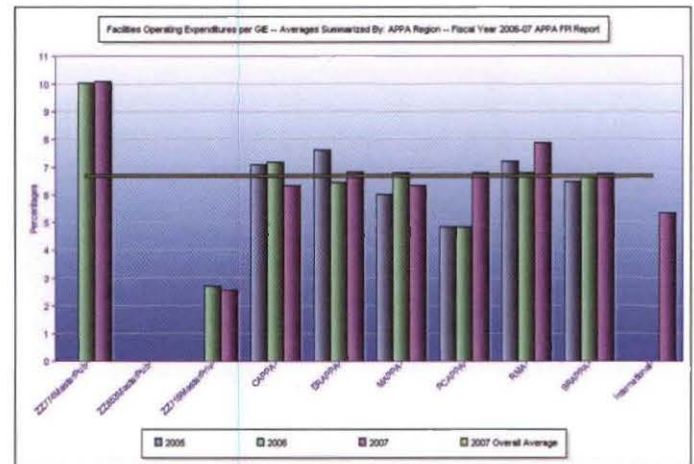
So you ask, how can I get started? The first step is to understand the facts about your buildings and infrastructure and how those facts can be woven together to create a compelling story. APPA's Web-based Facilities Performance Indicators (FPI) report tool and Essential Question Set are certainly an effective way to do this. As a facilities manager you need to fully understand:

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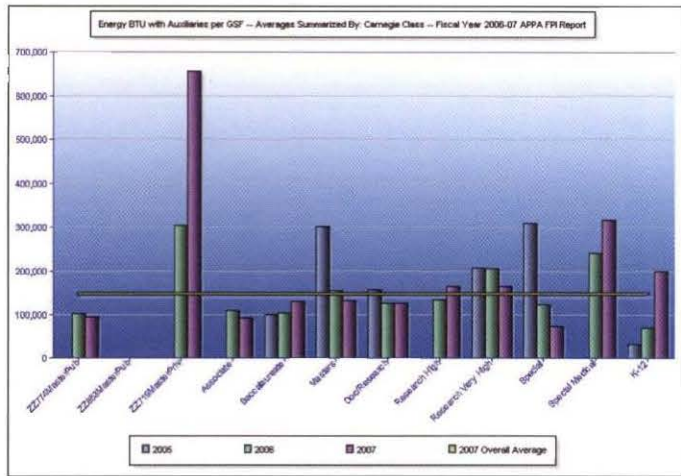
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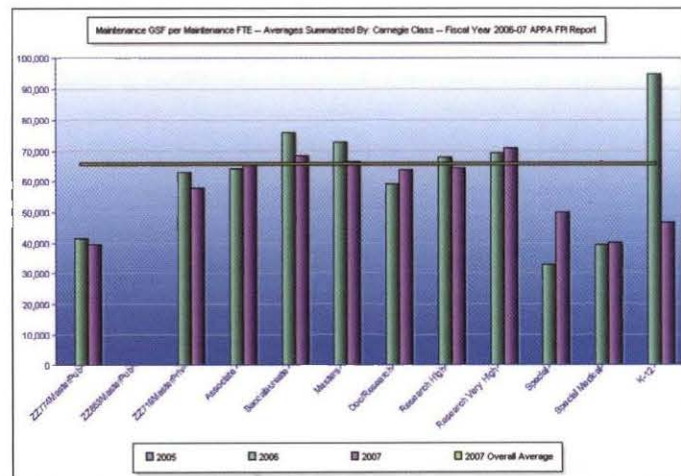
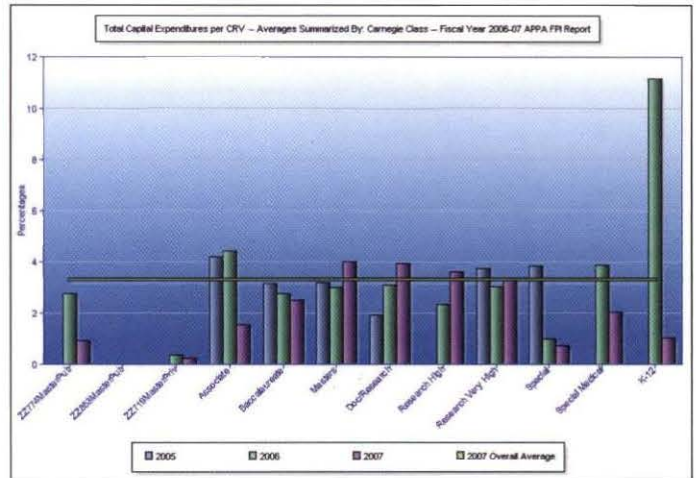
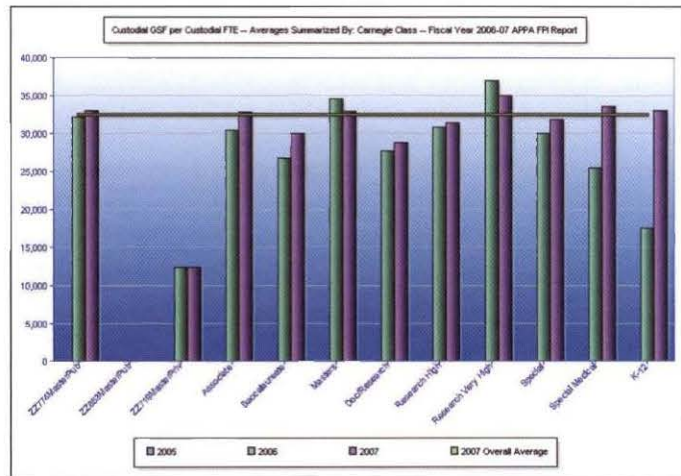
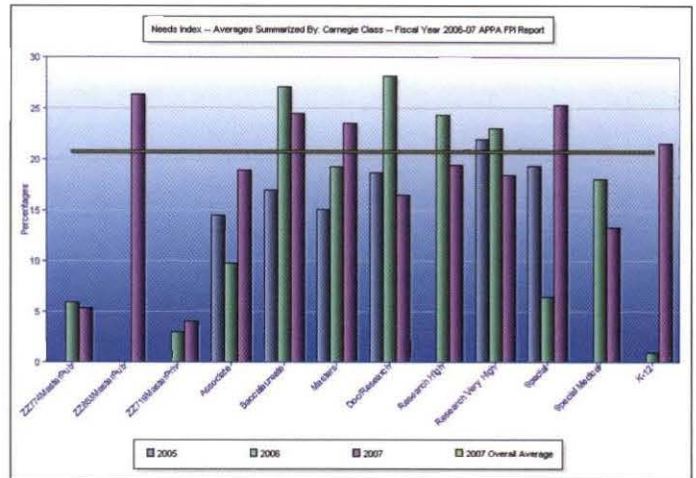
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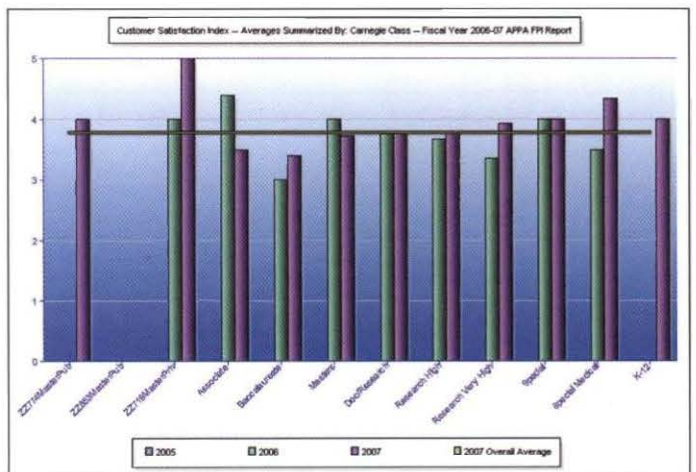
- To what degree you're effectively using your operating funds to support desired outcomes.



- Whether you're making appropriate investments to your buildings, infrastructure, and programs.



- Whether your customers are satisfied with the space and service.



With these tools you now have the realities and the compelling story; the next step is to share that story with campus decision makers.

We also have to be realistic. In the highly competitive world of education, capital assets are but one challenge. Decision makers are faced with a myriad of challenges amongst them being shrinking state support, greater student demands, greater competition for quality faculty, greater competition for a diminishing pool of contract and grants, and sky-rocketing utility costs. Can you really blame a campus that decides to realign a portion of its CRDM (capital renewal and deferred maintenance) money to address another emergency requirement? It is our responsibility to inform them of the cost of making such a decision.

THE UNC SYSTEM TAKES A BOLD APPROACH

Jack Colby, assistant vice chancellor for facilities at North Carolina State University, saw yet another opportunity for FPI. His vision was to utilize the FPI to address the University of

North Carolina System's PACE initiative. The PACE initiative (President's Advisory Committee for Efficiency and Effectiveness) was put in place to encourage universities within the UNC System to look for opportunities to benchmark their facilities organizations and continually improve their performance. Jack made his presentation to the System Board and got a commitment to support a systemwide initiative for the facilities managers at each of the system's 17 campuses.

Perhaps the most important reason this initiative was so successful is that there was an agreement that each institution would go into this with the goal in mind of *improving their own organization by reallocating resources within their opera-*

tions. There would be no realignment of appropriations from one campus to another. This commitment by the System office helped institutions feel comfortable in participating without a fear of loss.

This initiative was supported with APPA training to be delivered within a nine-month period of time in late 2007 and early 2008.

An RFP was crafted that incorporated three sessions: the first to address survey completion, the second focused on how to read and use reports (data mining), and the third focused on senior facility officers and their leadership role in developing and implementing a change management strategy within their operations.

THREE SESSIONS AT UNC

The first session was conducted in August 2007 in concert with the rollout of the Web-based 2006-07 FPI survey. Two APPA facilitators traveled to Raleigh, and over a period of two half days, trained approximately 40 employees from all 17 institutions within the UNC System. Three of the institutions were familiar with FPI and had participated in previous surveys. The other institutions were taking the plunge for the first time. The goal at the end of the two half days was to ensure that all 17 institutions were comfortable with the initiative and comfortable with the FPI Web-based survey. Binders of documentation, tools, and reference materials were provided to each attendee by APPA.

The facilitators went through each question in each module within the survey (450 in all). A UNC support discussion list was set up giving the team the ability to share questions with each other. One of the most challenging aspects of a systemwide engagement for the completion of an FPI survey is creating consensus amongst the participants regarding where the institutions will obtain information necessary to complete a particular data field. This is guidance that must come from a Subject Matter Expert within the UNC System. No consulting group could ever fully understand the internal organization of a particular institution. Questions raised included such items as:

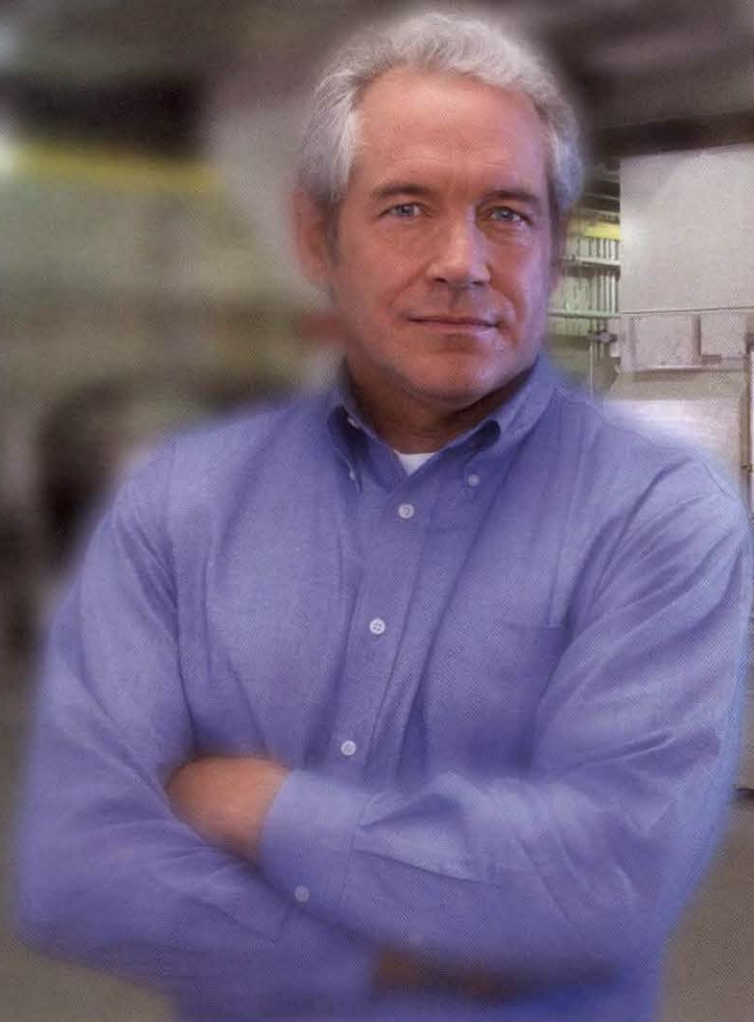
- What is our current construction cost for various facilities types?
- Where will I get our Current Replacement Value (CRV)?
- Will we include or exclude auxiliaries?
- How do we handle questions related to type of campus space?

The survey closed in December 2007 with all of UNC's 17 institutions having participated; the 100 percent success rate was phenomenal. The data was scrubbed and made available in report format in March 2008. During April the FPI APPA consultant created a number of support/training tools to help in the rollout of Session II for UNC. Five case studies were developed, a UNC average functional slice was developed within the FPI reports, and exercises were created.

In early May 2008 Session II was conducted. Again, more than 40 individuals attended two half-day sessions. The FPI report for 2006-07 was reviewed in great detail and the essential question framework was presented. The group then was introduced to an executive briefing presentation template and they were turned loose to start their homework. The team was required to mine the FPI data for their institution and create an executive briefing for their senior facility officer; this briefing



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would be utilized in Session III. The teams set to work, completed the spreadsheet, and proceeded to initiate their work on the executive briefing.

Session III was held two weeks later and again utilized the two half-day format. Attendees included associate vice presidents and directors of facilities from the 17 UNC System institutions. The session included coursework in leadership, strategic planning, change management, and total cost of ownership. The group worked in teams, taking data for an institution and making recommendations for how the institution could address its challenges and utilize its strengths in moving forward to improve the organization. Many of the assessments and recommendations were deemed helpful to the actual institution.

RESULTS

Overall the UNC System FPI project was quite successful. The project brought together facilities professionals from all 17 institutions and gave them a forum to problem-solve. Additionally the group was able to develop collaboratively a strategy of how a particular data point would be identified and the source of information. This gave many of the smaller institutions confidence in moving forward. The vision of utilizing the APPA FPI to meet a critical need and mobilizing support

through the UNC System Office has provided a significant benefit to the facilities managers within the System. All of the APPA facilitators were most impressed about the seriousness in which the session attendees approached the task and how well they documented their efforts.

The effort for UNC System institutions will continue in 2008 as they further refine their data sources and prepare for the 2007-08 FPI cycle. At the end of the third cycle, trend data will be available to begin showing progress toward improved utilization of resources already available to the System's senior facility officers.

The challenge is now presented to other systems organizations and facilities leaders to embrace this approach and become the enabler to help ensure that additional facilities managers become knowledgeable about their realities and share this information with the team on their campus that can help make a difference moving forward. Our hat goes off to the UNC System for taking the lead with such a bold initiative. ☺

Maggie Kinnaman is a Past APPA President and director of business administration for the facilities division at the University of Maryland, Baltimore. She can be reached at mkinman@af.umaryland.edu.



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Effective & Innovative Practices Award Winners: *Creativity and Practicality*

APPA's Effective & Innovative Practices (EIP) Award continues to highlight an ever-growing list of creative programs and processes that enhance and transform service delivery, lower costs, increase productivity, improve customer service, generate revenue, or otherwise benefit educational institutions. The five 2008 award-winning entries focused on the Facilities Condition Index; accessible landscaping; inspection by trades; individual and organizational excellence; and environmental conservation awareness.

Up to five EIP submissions are eligible each year for a cash award of \$4,000, which is generously sponsored by Sodexo Campus Services. Entries can describe either a new program or significant restructuring of an existing program or process for success. APPA's Professional Affairs Committee, led this year by Kevin Folsom of Dallas Theological Seminary, selects the winning entries based on a point system. This year there were 18 entries from 16 institutions. The five successful schools received special recognition and a check at APPA's 2008: The Rise to Greatness conference in July.

To view the complete applications and summaries from previous years' EIP winners, or to learn more about how to submit an entry for the 2009 awards, please visit www.appa.org/recognition/effectiveandinnovativepractices.cfm.





Montana State University

FACILITIES CONDITION INDEX

By Victoria C. Drummond, AICP

Victoria Drummond is the associate planner for facilities at Montana State University, Bozeman, MT. She can be reached at victoria.drummond@montana.edu. This is her first article for Facilities Manager.

Efficient and cost-effective maintenance of buildings is a growing concern as the average age of buildings increases. More institutions are looking for maintenance audit methods to manage facilities operations, maintenance, and expansion. In 1992, Montana State University created a desktop database program - Facilities Condition Inventory (FCI) - to track the variable condition of campus buildings. MSU's FCI program provides an objective, consistent, systematic evaluation of the general condition and deferred maintenance profile of buildings and is a useful methodology in determining comparable condition assessments within a geographical area. After MSU shared the program and trained other university units and state agencies, Montana governing bodies began to rely on FCI reports when considering budget or resource allocations. In 2007, the value of the FCI program was further recognized and used as the fundamental methodology in response to a lawsuit claiming the state's public education (K-12) is inequitable, due in part to the condition of school facilities. MSU's dedication to refining and sharing the FCI program and its agency and legislative acceptance has enabled MSU to improve its public service to Montanans by its role in assessing the condition of state facilities from K-12 schools to institutions of higher education.

INSTITUTIONAL BENEFITS

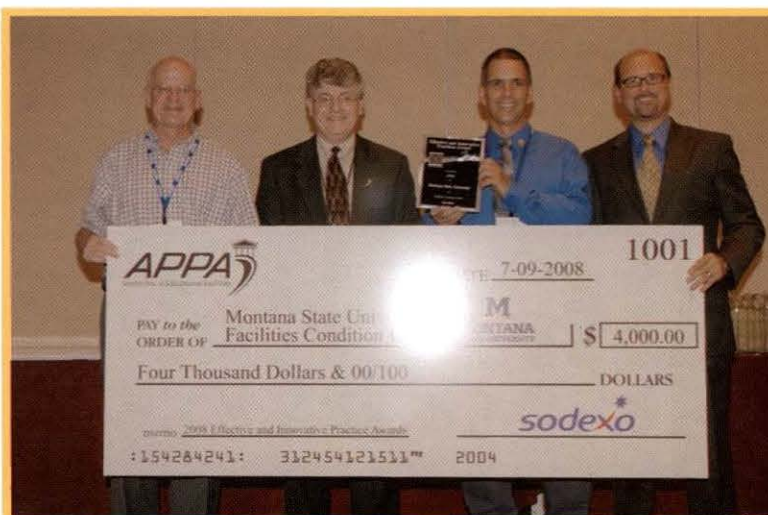
Periodic evaluation of the condition of facilities is essential for effectively managing facilities budgets, operations, maintenance, and expansion. A recurring assessment or audit of building conditions in a cycle that evaluates the entire campus, can provide deficiency data useful to governing bodies, administrators, and maintenance personnel.

MSU's FCI program is based on APPA's Model for Facilities Audits, the philosophy described by Harvey H. Kaiser in *The Facilities Audit: A Process for Improving Facilities Conditions* (APPA, 1993), and employs comparative cost data from a nationally recognized cost estimating system (*RSMeans*) to calculate deficiency estimates. Over time this regimented and systematic assessment of building conditions and FCI reports has provided deficiency details that directly improved funding and resource allocation decisions, improved the effectiveness of day-to-day maintenance operations, assisted administrators and managers in long-range capital planning, and informed prioritization of building renewal and deferred maintenance projects. The compilation of records provides a dynamic value of the physical assets and enables a realistic and objective view of the major campus facilities at any given time.

UNIQUE CHARACTERISTICS OF THE PROGRAM

Efficient and cost-effective maintenance of buildings is increasingly important as funding for facilities is more difficult to acquire and construction materials and labor costs cause large construction projects to cost mega-millions. While other audit programs exist and are available, MSU's FCI program is a hybrid of overview information intended to be achieved using in-house resources with modest effort and cost. Qualities of the FCI program that make it a unique program are:

1. It utilizes an in-house inspection team of facility professionals, custodians, building occupants, and trades personnel to inspect and record a snapshot, or profile in time, of the building's condition. The team approach has played a vital role in the overall success of the FCI program's value. Management and professional trades people are invested in the process and the workflow outcomes of the audits. Team members provide the history of corrective actions, identify recurring issues, strategize potential solutions, and record



Montana State University

the results. The team approach is also unique because it involves representatives from numerous disciplines and each contributes professional expertise and building fluency during the audit, which all adds a valuable dimension to the inspection results.

2. The FCI reports calculate a deficiency ratio, or comparison of the cost of the deferred maintenance to the replacement value of the building (which can be used in determining obsolescence and considering replacement timelines).

3. The database generates a variety of reports that enables use of the FCI as a tool to better inform budget, operations, and planning decisions.

- As a *budget tool* it can be used to solicit additional maintenance funding; can help demonstrate and forecast long-term resource needs; recognize and quantify the value of facilities as an institutional asset; identify and prioritize areas of greatest need; and record and illustrate net asset value improvement.

- As an *operational tool* the FCI can be used to help identify, prioritize, and schedule maintenance projects; facilitate efficient use of resources; record and illustrate improvements; work order generation; and detect and reduce excessive or inefficient maintenance.

- As a *planning tool* the FCI can be used to assist in capital planning; maintenance backlog management; workload management; project need prioritization; and long-range campus development or master planning.

4. MSU included flexibility in the program design so that the audit can also generate other inventories beyond the traditional FCI elements by having the inspection team note fire and building code compliance considerations and accessibility improvements that go beyond the traditional maintenance of existing conditions. The system can be amended (and has been at the state K-12 level) to include other general inventories such as classroom amenities.

5. To keep the program costs manageable, MSU includes only its major academic facilities in its FCI cycle, since performing the indepth FCI on relatively small buildings would significantly increase the human and financial investment on a per-square-foot basis without commensurate benefit.

6. MSU has extended the use of its FCI system to include auxiliary facilities, such as residence halls and dining facilities, at the request of the MSU Auxiliaries organization, for a comprehensive profile of the entire campus.

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PORTABILITY AND SUSTAINABILITY


Since its inception, the MSU FCI program has been freely offered to other state agencies in Montana. Annual training sessions have been broadened to speak to the increasing number of out-of-state users who have heard about the program from within their industry or from MSU staff networking at APPA and other conferences.

The MSU FCI program can be used by any facilities operation that wants to protect the unique qualities of their campus or buildings by systematically capturing a profile of the condition of their physical environment. The FCI program assists entities in preserving their valuable physical assets.

MUS's FCI program can be used by such a diverse group because it is simple to use. MSU did the research, custom development, and now produces the computer program as a desktop compatible system, so it is intended to be portable and *turnkey* for all the users. The FCI program's value is that, consistently executed and properly employed, it can be used to better inform building operations, maintenance scheduling, financial decisions and budget processes for an entire campus of buildings at a modest resource/cost investment.

DOCUMENTATION AND BENCHMARKING

The MSU FCI program has been refined and operational for four cycles (at MSU, a cycle covers three years of auditing one building per month). Collectively, the cycles established an evolving profile of the buildings, beginning with a baseline assessment. The FCI audit prompts a calculated deficiency ratio and replacement value for each cycle, which takes into consideration renovations, maintenance, and equipment replacements that have occurred since the previous audit. This cyclical record of maintenance and improvements also establishes a defensible position for appealing to the university community and governing bodies when buildings, particularly historic buildings, need adaptive reuse renovations. The identified campus deferred maintenance ratio can be used as a strategic benchmark to evaluate operational effectiveness.

This type of long-term perspective is most effectively created by the use of a systematic and regular assessment of institutional assets by a team of professionals experienced in building performances and deficiencies. MSU's FCI program provides a plethora of data useful for setting benchmarks and planning future campus development. In addition, projects identified through the FCI process are included for funding consideration in the Capital Projects Program request for every legislative session. 



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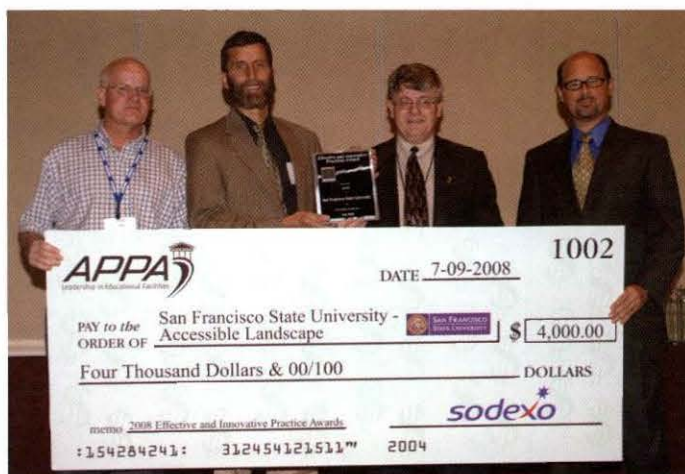
San Francisco State University ACCESSIBLE LANDSCAPE

By Brenda Lee

Brenda Lee is administrative assistant to the associate vice president for facilities at San Francisco State University, San Francisco, CA; she can be reached at brenda@sfsu.edu. This is her first article for Facilities Manager.

In the early 1990s, the Department of Facilities & Services collaborated with a landscape architecture firm to develop a National Endowment for the Arts (NEA) grant proposal to explore the concept of Accessible Landscape. The proposal was funded and the Accessible Landscape project was started to create landscapes that would meet the needs of all members of the San Francisco State University community. We envisioned landscapes that would transcend the mere implementation of ADA accessibility code requirements, as the separate accommodations mandated by ADA often have the undesirable effect of segregating users. The goal of the Accessible Landscape project was to create universally accessible landscape that promote inclusiveness by seeking solutions that integrate the competing needs of both the disabled and the general population.

As a result of our efforts, the campus environment has become more welcoming, with a user-friendly landscape. We have enriched the curriculum of participating colleges by introducing Accessible Landscape into classroom discussions and projects. We have an active design outreach program through our website, and we have been invited to participate in international design



San Francisco State University

conferences and to publish our results in universal design publications as far away as India.

INSTITUTIONAL BENEFIT

This ongoing transformation of our grounds into a barrier-free zone has not only improved the appearance of the campus, but has also contributed enormously to institutional benefit in the following ways:

Social Benefit for All: The most obvious beneficiaries of these accessibility projects are the disabled on campus, whose special

needs no longer limit their access to those common areas that have undergone 'inclusive' design change. Inclusive furniture such as the Open Bench adjusts to accommodate wheelchair-bound persons, while Sound Web audible cues assist the visually impaired to orient themselves on campus.

The general campus population also benefits from these changes. The elimination of regulation bars and rails along regraded pathways helps to beautify all of these areas. The musical and nature sounds emanating from the Sound Web offer an ambient aural treat to passersby. Height-adjustable furniture provides comfortable seating for different heights.

Educational Benefit: This project has instructional and practical value. Students are involved in the entire process including initial brainstorming, interacting with focus groups, conceptual designing, construction modeling, project scheduling and management, publication in a variety of formats, and speaking before classes and professional associations. In brief, we present them with an opportunity to apply what they've learned in the classroom to real-life experience.

Multidisciplinary Collaboration: We have collaborated with faculty and students from the Department of Design & Industry to develop ideas and prototypes for seating designs, and drawn on the talents of our Engineering Department instructors and students to design and build programmable logic circuit boards to provide the many features of the Sound Web. Department of Special Education experts transformed our view of appropriate placement for the audible landmarks, resulting in much greater effectiveness.

INNOVATION AND CREATIVITY

The task of designing an all-accommodating, multi-featured product is one that demands imagination, creativity, and problem-solving skills. Faculty, staff, and students dedicated to the Accessible Landscape projects have exercised their collective know-how to conceptualize, develop, and manufacture products that are innovative and unique.

We take great pride that the Benches and Sound Web were collectively developed by the university community. The process of innovation does not cease at project completion, as we constantly seek to

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improve upon existing designs. Our Universal Seating Design Studio program not only guided the original Bench concepts through four design generations, but formulates new ideas each year as new students seek to enhance the project.

The project's newest invention, the Sound Web audible wayfinder, demonstrates the ingenuity of San Francisco State University's engineering students. Beginning with wind chimes, the project now offers solar powered playback devices working 24/7 for our community. Careful attention was given to the selection of sounds used to indicate each type of landmark. A variety of sound clips from nature, music, and industry were tested in focus groups and in the field, for elements of clarity, likability, obtrusiveness, and resonance. The audio samples that won strong user preference were then paired to corresponding campus location types, for instance, the sound of wind chimes is associated with major pathway intersections, percussion rhythms mark the location of student support facilities, non-native birdcalls indicate primary entrance points to the campus, etc. Staff who conduct campus Orientation and Wayfinding training familiarize their clients with the function of these devices.

PORTABILITY AND SUSTAINABILITY

The idea of creating inclusive spaces has universal applicability. We receive inquiries from around the world regarding implementation, and our students are carrying this experience with them to their next professional roles.

Our colleagues are invited to join us in raising the standard for inclusiveness in public landscapes. This process can be replicated at any public and private place such as educational campuses, business parks and hospitals, recreational spaces, and airport and transit venues.

We are in the process of posting detailed construction information as open source material for others to use. Individual help is also made available. We have provided Sound Web design information to a user in South Carolina seeking to adapt the idea to a neighborhood.

Our standard is to utilize the most sustainable technology available in all our projects. For example, solar power is used for all electrical power requirements, making these items affordable for developing countries as well. Solar power is a cost effective alternative to traditional sources of energy that are rising in cost. Material choices are being guided by environmentally responsible objectives to maximize recycled content and recyclability when

the product becomes obsolete. Our standard is also to render the devices maintenance-free to the degree possible, and sturdy enough to resist and discourage vandalism.

DOCUMENTATION AND BENCHMARKING

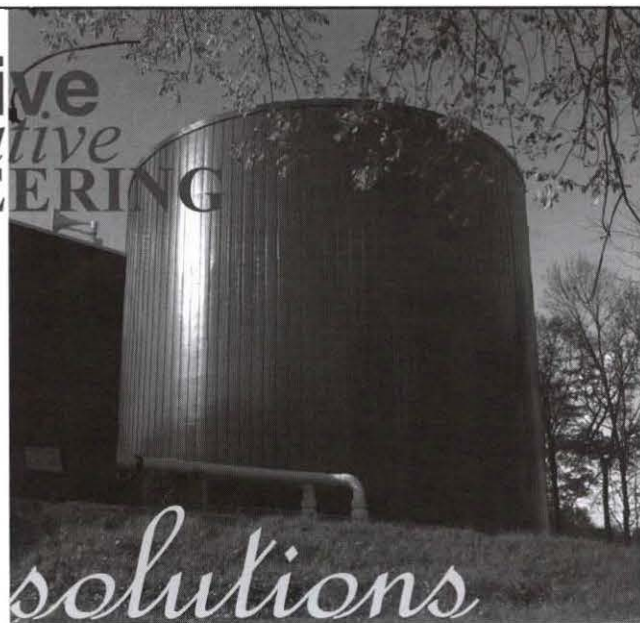
Prior to implementation, each project under Accessible Landscape actively seeks customer input during the evolutionary phase of a design. Focus groups, comprising a broad selection of staff and students from the university's administrative and academic departments, are invited to make recommendations that add value to the function and utility of the end product.

Analysis of accessible designs occurs during product conceptualization and testing. Design strengths and weaknesses are identified and analyzed, and these undergo several refinements until they are deemed satisfactory.

Project documentation for the most current Accessible Landscape project, the Sound Web, is posted on our department's website at <http://plopws.sfsu.edu/soundweb>.

The benchmark for the Accessible Landscape project is continuous improvement of the comfort and user friendliness standards for our university grounds, while making maximum use of on-campus resources to accomplish this goal. These objectives have been fulfilled, even as we constantly move the goalpost upward and make the process of meeting our goals an ongoing process. ☎

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University of Missouri INSPECTION BY TRADES PROGRAM

By John Neal

John Neal is associate director for construction management at the University of Missouri, Columbia, MO; he can be reached at nealj@missouri.edu. This is his first article for Facilities Manager.

The University of Missouri, Campus Facilities-Planning, Design, and Construction's Inspection by Trades Program is designed to utilize skilled trades personnel from various campus facilities departments to review, or inspect, the work of contractors. The program utilizes expertise already on staff to inspect work *during construction*. MU employees with various skill sets work with our construction project managers on site; they check for workmanship issues, application of materials, equipment access, maintainability, and overall work quality.

The Inspection by Trades Program is completely voluntary and is succeeding well beyond our expectations. Trades personnel are enthusiastic about the opportunity to be involved, construction project managers welcome the help, and contractors like the fact that it helps them avoid costly rework.

Not only have we seen improvements in the level of craftsmanship and work quality, but we're also gaining meaningful improvements in teamwork and collaboration. Trades personnel who may have previously felt "stuck" with the finished product are now engaged and providing excellent feedback. As a result, we're a much stronger team delivering better projects.

INSTITUTIONAL BENEFITS

Are comments about poor work by contractors common within your facilities organization? Do the people who operate and maintain your facilities feel that everything they "fix" is something the contractor did wrong? Deficient work by contractors can be a significant problem. Despite the best design and materials, the best contractor and the best of intentions, all can be for naught if installed work is below par. The question of deficient work by contractors becomes, "What can I do with the resources I have?"

This question was at least partially answered last year as a result of a routine shop meeting in which insulators in Campus Facilities Energy Management department voiced concerns to their supervisor about contractor workmanship. They were seeing things on completed projects they felt should have been pointed out and corrected prior to acceptance of the project. The session led to a meeting with the associate director of construction management, and the Inspection by Trades Program was begun.

Benefits of the Inspection by Trades Program are many, but first and foremost is that quality work is being completed in a craftsman-like manner. Nothing can spoil a good design quicker than poor workmanship.

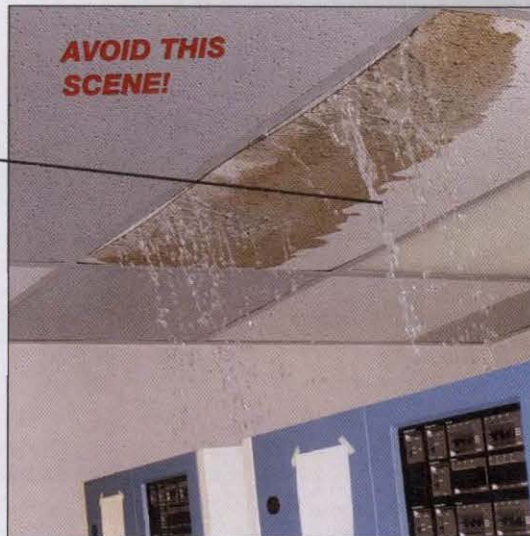
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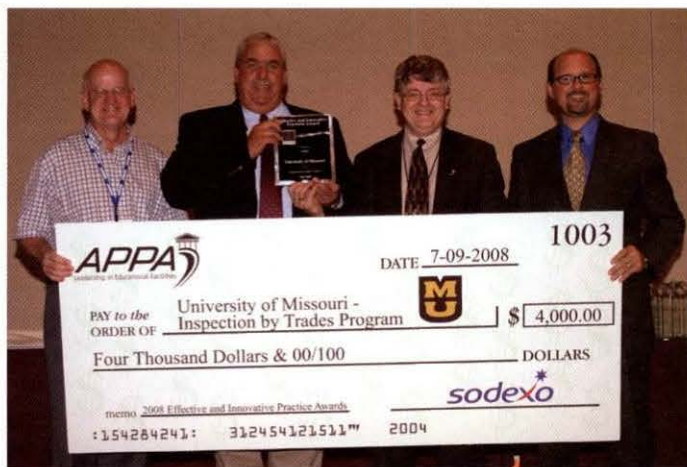


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INNOVATION AND CREATIVITY

This program is unique in that our inspection efforts and level of construction quality have been raised without adding staff. The program is streamlined, in that inspections occur without the involvement of construction management personnel. Inspectors are coached to be as critical as they wish and to log whatever comments they feel appropriate in a binder maintained in each construction manager's office. Each construction project manager reviews the inspectors' comments and, if in variance with requirements, directs the contractor to correct the deficiencies. All communication with the contractor is through the construction project manager, allowing inspectors to avoid uncomfortable or confrontational situations.

Alternating biweekly inspections are conducted by two two-person teams of in-house construction trades staff, a schedule that allows additional construction work to be performed without "getting too far ahead." Four different inspections each month by two different teams maintain a fresh inspection perspective on ongoing work while maintaining consistent scheduling.

Additionally, Energy Management insulators, testing and balancing crews, and controls personnel perform as-needed inspections near the end of a project when in-house testing, balancing, and controls work normally occurs. These crews use the same inspection forms and log their comments in the same special inspection binder used by the in-house construction trades.

PORTABILITY AND SUSTAINABILITY

Organizations with in-house staff with expertise in certain crafts can utilize variations of the Inspection by Trades program. Whether personnel are plant-operations staff, maintenance staff, or in-house construction trades, all have first-hand experience in what does or does not work well or causes problems. Additionally, in-house staff usually possess a better sense of maintainability, equipment access, etc., that is easily achieved if discussed early in the process. Putting expertise in the right place at the right time pays big dividends in achieving the level of quality desired.

A constant search for crafts expertise in our organization is not only bringing about increasing interest in the program among crafts people, but is also allowing the program to expand and develop over time. Craftsmen who were formerly skeptical now want to be involved in this extremely low-cost, low-risk, easily started and maintained program at MU.

While quality construction work is the primary goal, a number of other benefits are being realized. Participation in the program is strictly voluntary, and the craftsmen involved are motivated and possess a positive, can-do attitude. As a result, teamwork and collaboration abound, along with camaraderie and support among internal departments. Early negativity has

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been replaced by constructive feedback. Trades people know that their expertise is valued and their concerns taken seriously, which results in better teamwork and better projects.

Funded through recharge fees, the program is essentially an extension of Construction Management staff, with excellent acceptance among campus customers. Staff are gaining first-rate inspection expertise, while at the same time freeing up the time of the construction project manager. Inspection costs are more than offset by improvement in the level of workmanship and the reduction in rework.

PROGRAM ANALYSIS AND DOCUMENTATION

As two major projects near completion in which inspectors have been involved, we've found that construction project managers — who typically must deal with immediate construction

issues and can devote little time to work-quality control — now take comfort in knowing they have help. Comments by inspec-

tors are reviewed by the construction project manager, who both follows up with the contractor for corrective action and gets back to the in-house trades inspectors about the corrective action taken. In many cases, an inspector may simply note "All looks good; no follow-up required" in the inspection binder.


With project work being scrutinized and documented it is abundantly clear in the first couple of projects completed

through the Inspection by Trades program that contractor rework and defects have been greatly reduced and the construction quality raised.

At face value it would seem that contractors would be reluctant to engage in an inspection program conducted by tradespeople. On the contrary, feedback from contractors has been overwhelmingly positive. Knowing the expense of rework, they wel-

comed the opportunity to identify and correct problems early, before they become huge, costly punchlist items. Briefed on the program at the beginning of each of the two projects, contractors knew what to expect and actively embraced and participated in the process as a way to control costs.

The Inspection by Trades program has been in place just under two years and has been well-received by both campus facilities managers at all levels and by cost-conscious campus customers to whom no charge is made for the quality control and cost-reduction the program provides.

Planning, Design & Construction continues to expand the Inspection by Trades Program and, as the work load dictates, will continue to utilize all resources available to reduce costs and improve construction quality. 

2009 Award Nominations Open

Nominations are now being taken for APPA's 2009 institutional and individual awards: Award for Excellence, Effective and Innovative Practices Award, APPA Fellow, Meritorious Service Award, and Pacesetter Award. The deadline for consideration for the 2009 awards is **January 30, 2009**. However, award submissions are being accepted year-round. Awards submitted after January 30, 2009 will be held for consideration in the 2010 award cycle. Visit www.appa.org/recognition for more information or to apply.



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Union College EXCELLENCE PROGRAM

By Loren T. Rucinski

Loren Rucinski is director of facilities and planning at Union College, Schenectady, NY; he can be reached at rucinski@union.edu. This is his first article for Facilities Manager.

Union College is a small undergraduate residential institution in Upstate New York, concentrating in liberal arts and engineering. The college has been in existence since 1795 with an enrollment of 2,100 students, and a campus containing 105 buildings on 130 acres of land, bordered on all sides by the City of Schenectady.

THE PROBLEM

The Facilities Services Department at Union College needed a change. Maintaining a campus consisting of buildings which were (on the average) 85 years old, many systems were antiquated, and emergency repairs and failures were common. With the limited funding available for asset renewal, the facilities group became a reactive organization. Scheduled maintenance was consistently interrupted by another unplanned situation. The work was always completed with a high degree of quality by a talented facilities staff, but with so many issues, efficiency was not always emphasized, and record keeping was sporadic.

The other challenge on daily operations was the dramatic increase in the number of buildings and square footage that occurred at Union from 1998 on to present day. Very few FTEs were added to the ranks to help maintain the additional 48 percent more buildings and 33 percent more square footage that was added to the Union campus. This put a big burden on an already underfunded and understaffed Facilities group.

However, the staff members in the Facilities Department are a dedicated group of employees with many years of service to the college. The average tenure for all facilities employees is over 14 years, with the longest single staff tenure being over 44 years.

What could be done to energize the department, gain efficiencies, and engage the staff? After some discussion with the vice president of finance and administration, the management staff decided that a comprehensive program would need to put in place that would identify goals which would in the end, improve the departments efficiency and enable it to manage the challenges



Union College

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it faced. We also decided that in order for the program to be successful, it should *not* be dictated by management but should have ownership from the bottom up, and many cases be developed by the very same people who were “in the trenches” on a daily basis. We named the initiative the **Excellence Program**, and realized that improvement would not happen all at once, but it would happen in baby steps, getting a little better each day.

EXCELLENCE PROGRAM MISSION STATEMENT

The basic mission of the Facilities Services Department is to effectively perform all stewardship duties through a planned and thoughtful caretaking of the campus facilities. This responsibility, which is taken very seriously, includes providing a safe, comfortable environment for students in an atmosphere that is conducive to learning.

Furthermore, it is the responsibility of the Facilities Services Department to maintain the existing campus, and facilitate the creation of new buildings, equipment, and campus areas that can be utilized by the Union College faculty and staff to provide the appropriate support of the college’s educational mission.

Emphasis on customer satisfaction is paramount to the Facilities Services daily work philosophy.

To support the department’s basic mission, the concept of the

Excellence Program was conceived. In the simplest terms, the program is defined through the following goals:

- Strive to become a little better each day
- Improvement each day, no matter how small, is a positive direction and even small improvements are cumulative, and over time, provide results that can be measured and built upon to increase the level of stewardship at Union College
- Identify, emphasize, and build upon department strengths
- Continuous communication through staff input
- Continuous training
- Positive feedback
- Consistency
- Change is a good thing

CHANGE MIGHT BE A GOOD THING BUT IT DOESN'T COME EASY

At first the reaction to the Excellence Program was mixed. Many staff members were open to the idea, some were on the fence but went along because they knew they should, and a small but vocal percentage of the staff were not about to buy-in.

The non-believers spent a fair amount of time lobbying with the rest of the staff not to accept the program. A few made the point that they wouldn’t even greet the management staff if they met in a corridor. We heard things like “why try to fix some-

thing if it’s not broken?” or “leave us alone and let us do our work.” Granted, the staff members that would not buy in to the program were a small percentage of the 110 members of the department. But a few loud voices can slow down the momentum if you let them. However the more we heard, the more were convinced that changes were needed. The non-believers were waiting for us to give up, hoping that this would just be another idea from management that would eventually fizzle out.

THE WORK ORDER SYSTEM

Probably the single most important improvement to the department and its ability to perform facilities management responsibilities on campus was the development of a new Web-based work order system. The staff had identified many obstacles they felt were keeping our department from attaining its goals. We felt that many of those obstacles could be addressed through a good system customized to our needs. We felt it crucial to the program, and to the success of the work order system, that the staff be involved in designing the system.

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Every campus community member who puts in a work request is contacted automatically by the system, and can inquire as to the status of their request. They are also notified by the system when the work has been completed.

The system is used by all supervisors and managers to prioritize and schedule work orders for planned maintenance.

The system is now used as a tool for objective evaluation for all hourly staff using the data collected throughout the year. Information such as actual hours worked vs. estimated hours, number of work orders completed (tied to productivity), number of work orders initiated (tied to initiative) can be benchmarked against shop averages and departmental averages.

RECOGNITION

One of the issues the staff brought up was that of appropriate, meaningful recognition. Our management team has the philosophy that you can never have enough opportunities to give a staff member a pat on the back. While that works on the day-to-day front, we thought it would be good to recognize their contributions as a whole. Longevity of service seemed to be a good way of doing this.

We compiled the data on our staff, and grouped them from 1-3 years, 3-5 years, 5-10 years, etc., all the way up to 40+ years. At one meeting we produced a slide show showing old photos of how the campus looked when the staff member of the longest years started working at Union. After the slides, we handed out pins showing the years of service in Facilities with a garnet crystal stone (Union's color) to each staff member starting with the newest and ending with the longest, announcing their names individually, graduation-style. At that point, the few "non-believers" were converted.

THE EXCELLENCE PROGRAM TODAY

The program continues, usually with a meeting each month that either has a training component, or we use it as a vehicle to communicate to the entire staff information on topics such as what is happening on campus in the future that might affect them.

We have made some great strides as a department thanks to this program, and we have been able to provide improved service to the campus community. The program will be ongoing. We still have strides to make, but we truly feel that we have gotten a little better each day.

In summary the Excellence Program has changed how we at Facilities Services do business, maintain the campus and interface with our customers in the campus community. The staff members are feeling good about themselves, are working as a team, and realize the importance of their work. The community has benefited from the improved scheduling and immediate communication. ☺



West Virginia University

WVU ENVIRONMENTAL CONSERVATION AWARENESS NOW (WE CAN)

By Barbara Angeletti

Barbara Angeletti is university recycling coordinator at West Virginia University, Morgantown, WV; she can be reached at barbara.angeletti@mail.wvu.edu. This is her first article for Facilities Manager.

West Virginia University Environmental Conservation Awareness Now (WE CAN) is an environmental awareness educational campaign. The following activities were features of the campaign:

- Light switch covers reminding building users to turn out lights put on all light switches.
- Posters reminding building occupants to recycle and conserve placed in buildings.
- Mouse pads that printed with the reminder to turn off electronics distributed to students, faculty and staff.
- WE CAN presentation given to incoming freshmen, faculty senate, staff council, the residence hall association, all housing and dining services staff, all facilities staff, extension and 4H groups, etc.
- WE CAN lightbulb exchange—switching incandescent bulbs for compact fluorescent lamps.
- WE CAN sponsored the Ecolympics Challenge. Residence halls competed against each other for a prize of their own choosing. The residence hall that conserved the most energy



West Virginia University

and recycled the most, per capita, was declared the winner.

- Recycling—Altogether, the WE CAN Ecolympics resulted in the recycling of 10.2 tons of paper in a five-week period from the residence halls alone. In addition, 3,465 pounds of No. 1 plastic bottles were recycled, totaling 58,905 plastic bottles, and 539 pounds of aluminum cans, or 9,163 cans.
- Energy Savings—Summit Hall achieved the greatest energy savings, a 27.7 percent reduction of energy use.

INSTITUTIONAL BENEFITS

WE CAN addresses the interests of those who are seeking not just solutions to the global warming crisis, but also ways of living greener. Most students care little about the dollar amount spent by WVU in the delivery of the services they expect in return for their tuition dollars. They do, however, care about decreasing the carbon footprint of WVU. From the perspective of university administration, saving hundreds of thousands of dollars a year in utility costs creates an undeniable argument for support of the campaign. Few can argue with the simple, yet powerful message of conservation.

The basic message of WE CAN is “please recycle and conserve,” and light switch covers reminding building users to turn out the lights were put on all light switches. Posters reminding building occupants to recycle and conserve were



The basic message of WE CAN is “please recycle and conserve,” and light switch covers reminding building users to turn out the lights were put on all light switches.

placed in nearly every building. Mouse pads that are printed with the reminder to turn off electronics were distributed to students, faculty and staff at various student fairs. The WE CAN presentation was given to incoming freshmen, faculty senate, staff council, the residence hall association, all housing and dining services staff, all facilities staff, extension and 4H groups, and various other groups that made a request. WE CAN hosted a lightbulb exchange—switching incandescent bulbs for compact fluorescent lamps—which was not limited to only the WVU community, but was open to the greater Morgantown community as well. This allowed WVU to emerge as a leader in the conservation effort, and set the example for all other higher education institutions in the

state of West Virginia.

INNOVATIVE QUALITIES OF THE PROGRAM

As a way of raising awareness about conservation and recycling, WE CAN sponsored its first Ecolympics Challenge. Residence halls competed against each other for a prize of their own choosing. Whichever residence hall conserved the most energy and recycled the most, per capita, over a five-week period in October-November 2007, would be declared

Project:	Ecolympics Dorm Challenge				
	Generation Fuel Not Burned equals 514 Barrels Crude Oil*				
	Saving 285588 kilowatt hours of electricity is also equivalent to:**				
	Eliminating the pollution from 39 cars per year or planting 82 trees per year.				
		Utility Savings	Environmental Savings From Electric Reduction in lbs.	Environmental Savings From Gas Reduction in lbs.	Environmental Savings Total in lbs.
	MCF savings	0			
	kWh savings	285,588			
	KW savings	-			
	CO2 Savings (Greenhouse gases)		579,556	-	579,556
	SO2 Savings (Acid Rain)		4,477	-	4,477
	NOX Savings (Smog and Acid Rain)		2,017	-	2,017
	CO Savings		29	-	29
	Particulate Savings		183	-	183
	Hydrocarbon Savings		0	-	-

the winner. In order to keep everyone thinking about sustainability, WE CAN hosted a different activity each week during the challenge. A trivia quiz was posted on the website, and whichever residence hall had the most participants per capita won extra points in the challenge. A scavenger hunt was conducted during the final week of the challenge, with the residence hall that housed the winners getting extra points for the challenge. Individual prizes were given to the winners of these activities as well.

With respect to energy conservation, points were assigned to the ten teams that covered a range from one to ten—ten being awarded to the hall that conserved the most energy and one to the hall with the lowest conservation numbers. October energy data was compared to that of the previous month of September, and a percentage difference was calculated for each residence hall. Based on the point system, whichever hall earning the most points overall would be declared the winner.

The WE CAN Program allows for expansion into other aspects of university operations, e.g., transportation, purchasing, construction, etc. Because of intense marketing, the WE CAN logo is identifiable across campus, so using it to brand other green initiatives not only makes sense, but gives those initiatives a head start through brand identification.

PORTABILITY

This effective and innovative practice is an excellent example of a practice that can transfer directly to others. The WE CAN Program and the Ecolympics Challenge can be exported to and applied by other educational institutions with very few, if any, changes.

With a few tweaks to the promotional materials, this entire practice can be ready to use by our colleagues in APPA.

RESULTS AND BENCHMARKS

Altogether, the WE CAN Ecolympics resulted in the recycling of 10.2 tons of paper in a five-week period from the residence halls alone. In addition, 3,465 pounds of No. 1 plastic bottles were recycled, totaling 58,905 plastic bottles, and 539 pounds of aluminum cans, or 9,163 cans. This equals 68,000+ bottles and cans that were diverted from the waste stream. The environmental benefits of recycling the paper, plastic and aluminum are as follows:

173+ trees saved
126.25 barrels of oil saved
71,400 gallons of water saved
53,981 kWh saved

Aside from the obvious environmental benefits of this program, the greatest overall benefit is that students continue to recycle following the challenge, which was the overall goal of the WE CAN Ecolympics at the outset. Clearly, a 27.7 percent reduction of energy use for a residence hall is an incredible accomplishment. The students, through an organized effort, modified their behavior to conserve energy.

The total environmental result of the WE CAN Ecolympics as calculated by the DOE's energy star calculator is as follows:

The input received from everyone involved while formulating the program, during its application, and upon announcement of the results, was overwhelming positive. The success of WE CAN validates the effort of the program and generates hope for a greener future. ☺


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APPA Debuts Its Qualified FPI Advisor Program

By Christina Hills

How well is your facilities portfolio in alignment with your institution's strategic direction? Do you know where to go to collect data within your institution to complete this year's FPI (Facilities Per-

formance Indicator) survey? Assuming you had the data, would you know how to input it into the survey? Would you know how to interpret your institution's metrics in the FPI report?

APPA understands the challenges

faced by many of our facilities members. APPA is determined to meet these challenges with the implementation of our newly created Qualified FPI Advisor program. In early July, a small cadre of our most seasoned facilities professionals gathered at the APPA office for training and certification in this program. These professionals are available to visit your campus and help guide you and your staff with FPI-related tasks.

The FPI Advisor program is meant to be custom designed around every school's

APPA's Qualified FPI Advisors



Doug Christensen

Doug Christensen, APPA Fellow

Facilities Education Experience: 25+ yrs
Facilities Related Recognition: Past APPA President, Faculty member for Facilities Institute, Chair of Leadership Academy, APPA Fellow



Ernest Hunter

Ernest Hunter

Facilities Education Experience: 8 yrs (26 yrs in facilities work for U.S. Navy) Facilities Related Recognition: 2008 TAPPA Emeritus Award recipient, several awards while Director at University of Texas-Austin



Tom Harkenrider

Tom Harkenrider

Facilities Education Experience: 30 yrs
Facilities Related Recognition: APPA President's Award for SAM and FPI, APPA FMEP, and Award for Excellence committee and task force



Dan Johnson

Dan Johnson

Facilities Education Experience: 26 yrs
Facilities Related Recognition: PCAPPA Board for 7 yrs, VP for APPA's Professional Affairs and on the Professional Affairs Committee for 6 yrs, APPA Institute and Leadership Academy graduate



Duane Hickling

Duane Hickling

Facilities Education Experience: 20 yrs
Facilities Related Recognition: AVP at University of Chicago, Assistant Vice Chancellor for Facilities at University of Wisconsin, and Director of Facilities at University of Southern California



Maggie Kinnaman

Maggie Kinnaman

Facilities Education Experience: 30 yrs
Facilities Related Recognition: Past APPA President, APPA Board or committee member for 20 yrs, Institute and Academy Faculty Member



Jack Hug

Jack Hug, APPA Fellow

Facilities Education Experience: 44 yrs
Facilities Related Recognition: Past APPA President, FMEP Team Leader, APPA Institute Faculty Award, Presidential Award from three APPA Presidents



Ted Weidner

Ted Weidner

Facilities Education Experience: 19 yrs
Facilities Related Recognition: FMEP Team Leader, Institute Faculty Member, CFaR and CFC Strategies and Alternatives Committee member, *Facilities Manager* Bookshelf Column Editor

For more information on the Qualified FPI Advisor Program or to schedule an advisor, visit www.appa.org/research/fpiadvisors.cfm, or contact Christina Hills at christina@appa.org.

unique set of needs. The advisors can structure on-campus sessions in myriad ways to best suit the needs of your institution. For example, the advisors can acquire, evaluate, and input the data into the FPI survey. They can also develop and create a tailored Executive Summary Report on the institution's FPI findings.

APPA is also interested in learning who you consider your peers or cohort schools to be. The advisors can tailor a program on a single campus that would allow your peers to attend the same training so that all cohort schools can participate in the FPI survey and compare metrics and benchmarks with each other. The FPI allows participants to view three years' worth of data and, if all cohort schools participated year after year, the data would only become more essential and robust for benchmarking purposes.

Large state system schools can consider all the individual campuses that comprise the state system as cohorts or peers. APPA did this successfully with the University of North Carolina System (refer to "FPI Lights the Way for the UNC System" in this issue of *Facilities Manager*), and APPA is currently working on a similar initiative with California State University System schools. Your cohort may not necessarily be a state system; it may be your athletic conference, a consortium of private liberal arts schools, or another affiliated group altogether.

The fees for the FPI Advisor program are based on the requested training needs of the school. APPA does offer all-inclusive training packages for individual schools and for state system schools, or other recognized cohorts.

The FPI is now a member benefit and as such, the survey and the accompanying report will be free for all members that fully participate in the survey. (Non-participating member institutions may purchase the final report at a discount from the nonmember price.) APPA will also unveil the newly created Essential Question Set on this year's FPI survey. Our participating members provided

APPA with a set of questions they felt every facilities manager needed to have answered in order to share the information with campus decision makers. This Essential Question Set will dramatically reduce the number of data fields needed to tell a complete story, and it will simplify the data input process.

The hope is that every campus will place a higher value on this member service by participating fully in the FPI year after year. APPA also believes that the FPI is a powerful tool when used not only as an internal benchmarking tool but also as a comparison tool with

(continued on page 53)



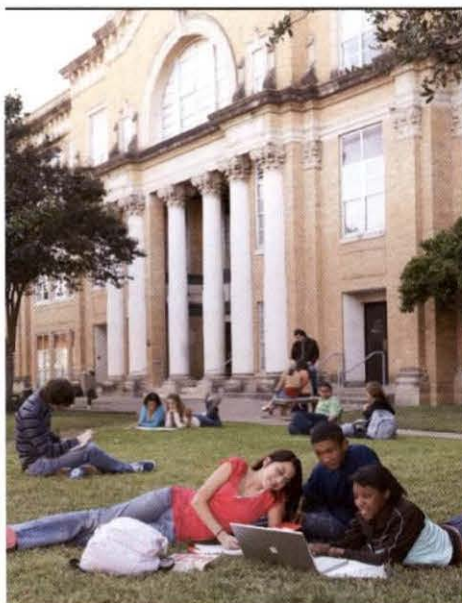
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Book Review Editor: Theodore J. Weidner, Ph.D., P.E., AIA

This month I am appreciative of the efforts from Kevin Folsom, Dallas Theological Seminary, for his thoughtful review of an important APPA publication that has received national attention in print and radio.

Reviewed by Kevin Folsom

**BUILDINGS ... THE GIFTS
THAT KEEP ON TAKING:
A FRAMEWORK FOR
INTEGRATED DECISION MAKING**

By Rodney Rose, with David A. Cain,
James J. Dempsey, and Rich Schneider,
APPA, 2007, 94 pages, \$70 (APPA
members), \$95 (nonmembers)

Fortunately for me, I began my facilities management career in 1988,

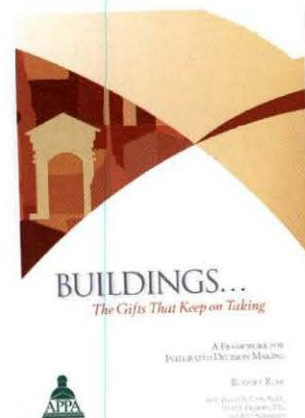
where I still serve today at Dallas Theological Seminary. Formulating the planned capital renewal process was already under way for about ten years by our industry giants such as Harvey Kaiser, Robert Brooks, Rodney Rose, and many others. So I was able to cut my teeth in this era.

In 1991, our school's President's Office received a complimentary copy of one of the early publications that was a joint project by APPA and the Lilly Endowment called *Today's Challenge to Tomorrow's Vision: A Study of Facilities Conditions at Schools of Theology*. The book made its way down to me, and I was forever changed from a facilities manager to facilities leader and visionary.

Essentially, our jobs are about facilities portfolio management of existing facilities; however, often we're faced with campus leadership excited about a donor who is ready to contribute large sums toward a new facility that has not been on the radar or programmed with a revenue source for funding sustainable functionality through its design life. This is a difficult situation for a facility manager who will ultimately inherit the facility to preserve without the needed funds to do so properly.

Buildings... The Gifts That Keep on Taking, by Rod Rose as primary author, is an elegantly written fresh look at the tried and true practices of the planned capital renewal discipline of long-term owned facilities; it includes historical data and research by APPA's Center for Facilities Research (CFaR) with a Total Cost of Ownership twist.

Included are new concepts, techniques, and planning strategies, such as the Strategic Investment Pyramid, which leads organizations to ask the



most important questions first when considering a new facility. Why invest? What can we afford? When and where to invest? How much should we invest? Then readers are led up the pyramid to Facilities Data & Matrices, Decision Perspectives, and Asset Investment Strategy.

Effective use of the Strategic Investment Pyramid has a number of significant benefits. It focuses on the investment value of facilities and promotes integrated planning and budgeting, providing an excellent tool for making the business case for alternative solutions to facility needs. Therefore, it helps you establish a sustainable funding model for existing and proposed facilities to preserve your facility's maximum effectiveness functionality for life.

The book provides a good understanding of the Total Cost of Ownership. The first cost of a facility is only one-third of the full cost of ownership during a facility's design life. Seldom does anyone think about how they are going to pay for the remaining two-thirds of the cost.

There should never be a facility manager, or one aspiring to be, without knowledge of the concepts and techniques provided in this book.

While it has taken almost 20 years, my institution is almost in line with the concepts of planned capital renewal, and the momentum cannot be stopped now. We now consider the existing facility's renewal needs and reuse capabilities before building new. My congratulations and thanks to all those who contributed to *Buildings... The Gifts That Keep on Taking* to bring light to the stewardship issue of facility ownership!

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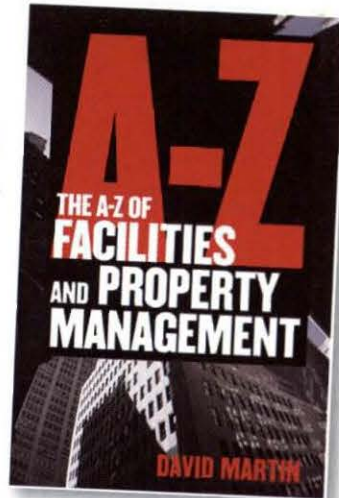
Reviewed by Ted Weidner

THE A-Z OF FACILITIES AND PROPERTY MANAGEMENT

By David Martin, Stylus Publishing, 2006, \$38.95

This book provides a clear set of definitions of property management terms with important points of how each interrelates to other terms and the overall property management profession. *The A-Z of Facilities and Property Management* is written by a British author so there are several terms and references more appropriate for international APPA members.


Despite some terms and references that may not match U.S. laws exactly, there are still several points made that apply to any nation. There is a significant focus on leases on both the landlord and tenant sides and property transfers.



Issues of default responsibilities for problems if they are not addressed specifically in the contract are discussed. To avoid default responsibilities, general steps or investigations prior to entering

into a land contract are also discussed including environmental investigations, zoning, or renovations.


While the author is not an attorney, this reference had an overall feel of legal aspects to property transactions and management. Current issues of terrorism, contingency planning, and security are presented and connected to other property issues.

The overall format is clear but sometimes strained. There was a strong need to provide a term for every letter of the alphabet so some letters only had one term presented and the letter "Q," with no appropriate term, had a quiz instead. Despite the format, this book will be helpful for facility officers who manage a significant number of leases or property transfers. However, this reference is no substitute for good legal advice when executing any contract. 

Kevin Folsom is APPA's vice president for professional affairs and the director of facilities and plant operations at Dallas Theological Seminary, Dallas, TX; he can be reached at kfolsom@dts.edu. Ted Weidner is assistant vice chancellor of facilities management & planning at the University of Nebraska-Lincoln; he can be reached at tweidner2@unlnotes.unl.edu.

knowledge builders cont'd

your peers. The Qualified FPI Advisor program will allow your school to better position itself to take full advantage of this incredible member benefit.

The 2007-08 Facilities Performance Indicators survey is now open and has been reformatted for improved participant use. The deadline for completed surveys is *Monday, December 1*. The resulting FPI Report & Dashboards will be published in February 2009. 

Christina Hills is APPA's research specialist and can be reached at christina@appa.org. This is her first article for *Facilities Manager*.

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Compiled by Gerry Van Treeck

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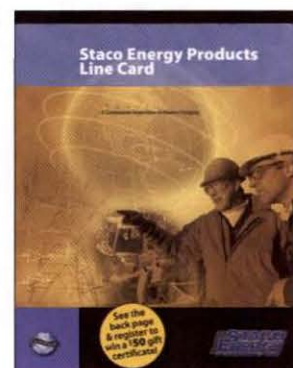
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Staco Energy Products has published a new full-color brochure highlighting their tailored power quality solutions which

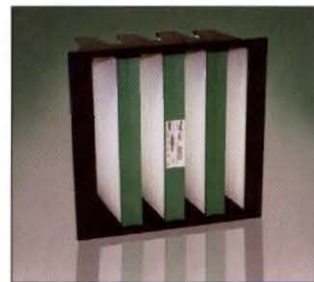
include power factor correction and harmonic filtering, single-phase and three-phase Uninterruptible Power Supplies (UPS), voltage regulators, and power conditioners. The company's ability to engineer custom solutions to virtually any electrical power problems is also provided. For additional details visit Staco Energy Products at www.staco-news.com



Paradigm Group introduced a collection of environmentally responsible jan/san and breakroom supplies that includes paper goods, soaps, and cleaners. The new collection, which includes offerings from Paradigm's Emerald™ line, provides an assortment of environmentally sensitive alternatives to meet the increasing demand for "green" facilities products. The collection consists of environmentally conscious, proven products from various manufacturers as well as several paper-based items from the company's Emerald line. The Emerald products are designed to meet the unique needs of the commercial and institutional facility and meet EPA recommendations for recovered fiber content, include bath and facial tissues, household and industrial roll towels, C-fold and multi-fold sheets. For more information about Paradigm Group visit www.paradigm-grp.com

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has introduced a new filter configuration that radically changes how air is cleaned in a commercial or institutional environment. The new product has significant advantages in terms of immediate reductions in facility fixed costs. Durafil ES is an easy drop-in replacement for any standard V-shaped filter. The Durafil ES was engineered for facilities with large AHUs (air handling units), including colleges and universities, offices, and many industrial environments. It is the "greenest" filter available, producing substantial, recurring energy savings. It also lasts longer than any final filter and has less total environmental impact. For further information visit Camfil Farr at www.green-air-filters.com 



New Products listings are provided by the manufacturers and suppliers and selected by the editors for variety and innovation. For more information or to submit a New Products listing, e-mail Gerry Van Treeck at gvtgvt@earthlink.net.

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executive summary cont'd

to establish, grow, extend, and restore trust is the "leadership competency" of the new global economy. Trust holds the key to enhanced collaboration, increased innovation, and engaged execution, thus providing a truly competitive advantage. And, ultimately trust affects two measurable outcomes – speed and cost – which he defined as the "trust dividend."

Covey reinforced that in order to create a "trust dividend" (instead of paying a "trust tax") requires a focus on individual and organizational character and competence resulting in increased credibility. He outlined the 13 behaviors

of high trust leaders, identifying their obstacles and their counterfeits. Unfortunately, too many leaders think trust is too risky when; in fact, a propensity to trust is inspirational, contagious, reciprocal, and in general, facilitates more to happen. Frankly, leadership without mutual benefit – trust – is NOT leadership at all. What is your trust dividend?

So there you have it. As you can readily surmise, this was a powerful professional development opportunity that attendees experienced at the APPA 2008 conference in San Antonio this past July. The chance to learn from such great leaders, writers,

and thinkers, and to network with colleagues and business partners alike, was extraordinary.

You won't want to miss the APPA 2009 convergence next year, given the similar experience already being planned! Look for the registration opening this coming December and mark your calendar now for Vancouver, British Columbia, Canada next July 8-10, 2009. ☺

Lander Medlin is APPA's executive vice president. E-mail her at lander@appa.org.

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