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# FACILITIES manager

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## HONING the BRILLIANCE

WITH PRESIDENT POLLY PINNEY

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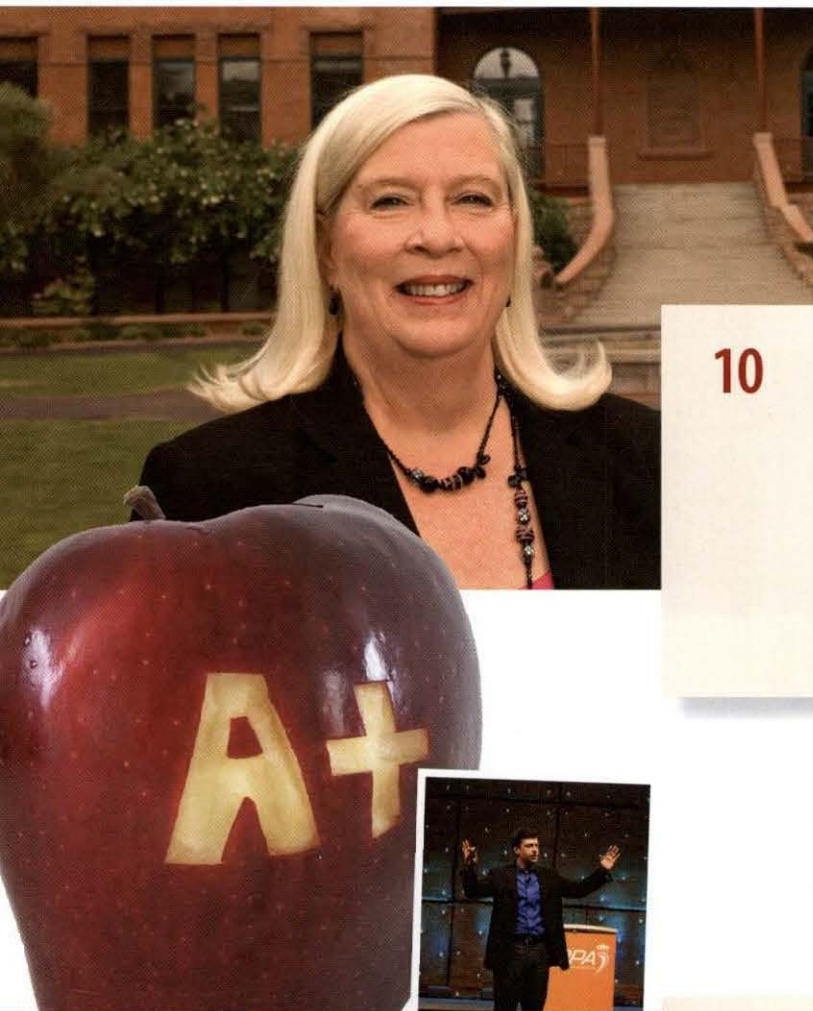
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WITH PRESIDENT POLLY PINNEY

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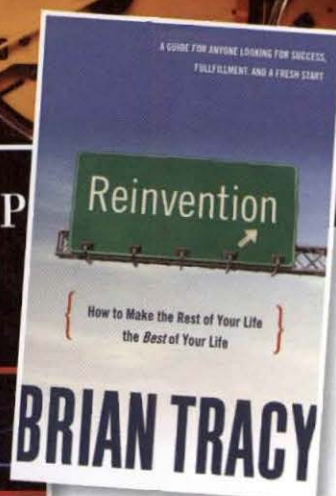
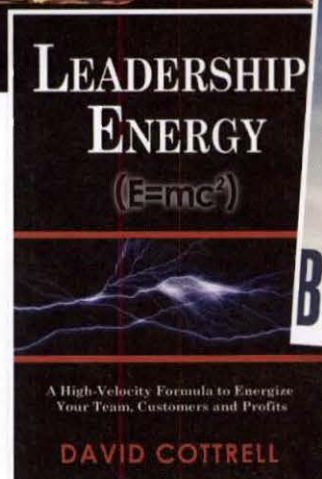
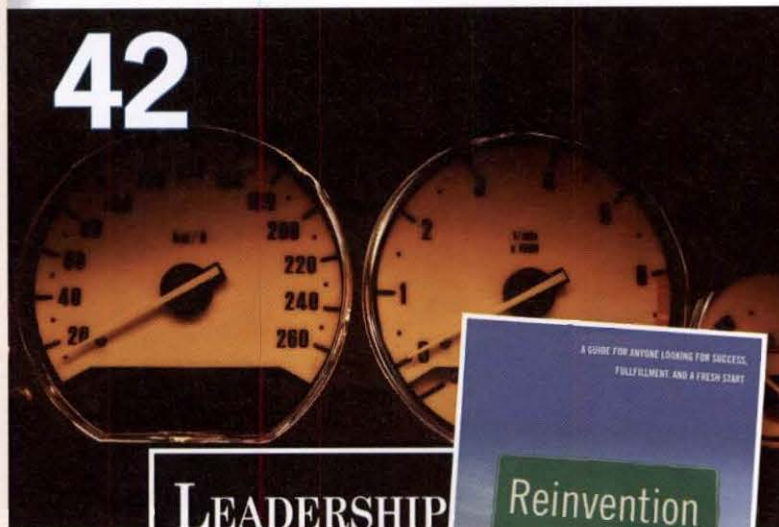
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## Through my years at APPA I've had

the great privilege to visit dozens of college and university campuses. Whether my visits were part of my work and learning at APPA (the old Executive Development Institute at Notre Dame, the University of Maryland for the Smart & Sustainable Campuses Conference, all the wonderful campuses that have hosted a SRAPPA conference, a personal tour of North Carolina State with Jack Colby); visits to potential colleges for my daughter's education (Case Western Reserve, University of Southern California, the sprawling Virginia Tech, the teeny Olin College of Engineering, and her eventual choice, the beautiful University of Virginia); or visits to campuses while on vacation or just because I wanted to go (UC Berkeley, Oberlin College, University of Washington, the Naval Academy, Central Methodist College, Dalhousie, IUPUI), I am always energized by the experience and appreciate each institution's history and sense of place.

When I read the landmark research study from the 1980s—"How Do Students Choose a College?" by the Carnegie Foundation for the Advancement of Teaching—and the more recent APPA/Center for Facilities Research study by David Cain and Gary Reynolds—"The Impact of Facilities on the Recruitment and Retention of Students"—each of which shows that the overriding reason for a student's selection is the appearance and "feel" of the campus, I wonder how it could be any other way.

That result does not come easily. It takes years of tradition, habit, occasional course-correction, and the combined efforts of students, professors, alumni, trustees, planners, community residents, and the educational facilities professional to achieve the rich and unique quality that is a college, university, or school.

Education is more critical now than it ever has been in our history. The programs need to be in place, and the campus facilities must support those programs actively and effectively. The work you are doing to support your institution's mission and vision is absolutely essential to its success.

## SUPPORT YOUR REGIONAL CONFERENCE!

The six APPA regions hold their annual conferences in September and October, and we urge you to attend yours. Economic realities may make it difficult for some of you to attend, but it is imperative that our regions succeed with their conferences.

You are certainly aware that your colleagues at the host institutions are expending a lot of time, energy, staff resources, and money to put on an excellent program for your benefit. The educational sessions, the exhibit hall resources of our business partners, the many networking opportunities, and more are invaluable to your professional development, particularly at the present time. If you haven't registered yet, do so now.

### Rocky Mountain

Sep 20-23, Tucson, AZ  
www.fm.arizona.edu/rma2009

### Central

Sep 26-30, Grand Forks, ND  
www.cappaedu.org/annual/  
acmeetinghighlights.aspx

### Midwest

Sep 27-30, Iowa City, IA  
www.facilities.uiowa.edu/mapa09

### Eastern

Oct 4-7, Portland, ME  
www.erappa2009portland.org

### Pacific Coast

Oct 7-9, Hollywood, CA  
www.regonline.com/builder/site/  
Default.aspx?eventid=703385

### Southeast

Oct 24-27, Daytona Beach, FL  
www.erau.edu/srappa2009

## Coming in Nov/Dec 2009

- Healthcare Facilities
- Environmental Liability Insurance
- Applying APPA's Custodial Guidelines at Slippery Rock

# FACILITIES manager

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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](http://www.appa.org).



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# facilities digest

## PAUL ROWLAND HIRED AS AASHE'S NEW EXECUTIVE DIRECTOR



Paul Rowland assumed the role of executive director at the Association for the Advancement of Sustainability in Higher Education (AASHE) on August 1, 2009. Rowland, who has been serving as Dean of the College of Education at the University of Idaho since 2006, "brings to AASHE an outstanding record of administrative leadership and a lifelong commitment to environmental and sustainability issues," according to AASHE.

Under Rowland's leadership, the University of Idaho's College of Education was fully accredited by the National Council for Accreditation of Teacher Education (NCATE), and secured a *U.S. News & World Report* ranking among the top 100 U.S. graduate education programs. Rowland has also served as the Dean of the School of Education at the University of Montana, Missoula, where he served on a variety of state and national committees and task forces related to education, sustainability, and education policy.

He has served on the boards of directors of the Global Network of Environmental Education Centers, the Arizona Natural History Association, and the Arboretum at Flagstaff. Additionally, Rowland held education positions at East Carolina University in North Carolina, New Mexico State University, Eastern New Mexico University, New Mexico Solar Energy Institute, and the State University College at Plattsburgh. For more information, visit [www.aashe.org](http://www.aashe.org).

## FPI SURVEY NOW OPEN!

The 2008-09 Facilities Performance Indicators survey is now open and ready to receive your data. The FPI survey includes an Essential Question Set of executive-level questions that will provide you with valuable strategic measures.



APPA's Qualified FPI Advisor program is ready to assist you in collecting data, clarifying definitions, working with data sources on campus, and understanding the value of your responses as they relate to the 2008-09 FPI report, which will be published through APPA's website in early 2010.

For more information about the FPI survey or the Qualified Advisor program, visit [www.appa.org/research/fpi/index.cfm](http://www.appa.org/research/fpi/index.cfm) or contact Christina Hills, APPA's research specialist, at [christina@appa.org](mailto:christina@appa.org).

## APPA MEMBER TO CHAIR INTERNATIONAL DISTRICT ENERGY ASSOCIATION (IDEA) BOARD



APPA member Juan Ontiveros of the University of Texas at Austin was elected 2009-10 chair of the International District Energy Association (IDEA) at the organization's annual meeting held June 30

during its 100th Annual Conference & Trade Show.

Ontiveros is executive director of utilities and energy management at UT Austin, where he oversees all planning, operations, and maintenance

for district energy, combined heat and power (CHP), and other systems serving 16 million square feet of space in 200 buildings. A licensed engineer, Ontiveros has more than 25 years' experience in facility design, construction, master planning, and operations. Prior to his work at UT Austin, he was facilities services director at the University of Texas at El Paso.

The new IDEA chair is a longtime member of APPA, serving on the faculty of APPA's Institute for Facilities Management in the Energy & Utilities core curriculum. He is also a member and past president of the Texas Association of Physical Plant Administrators.

## APPA IS PLEASED TO ANNOUNCE OUR NEWEST EFP DESIGNEES:

*Emmet Boyle,*  
University of Regina

*Michael Gardner,*  
Butler University

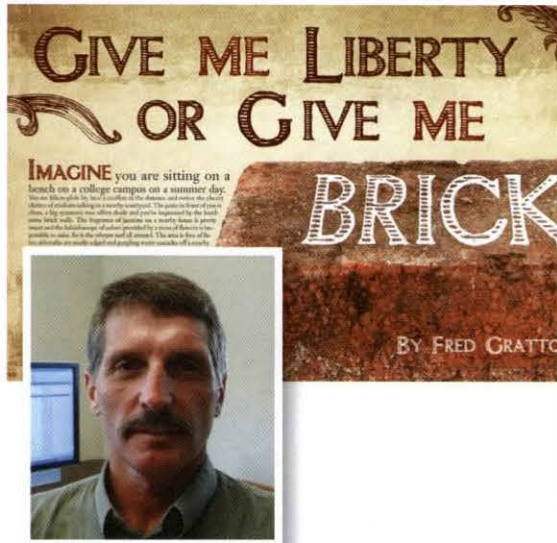
*Raymond Mirizzi,*  
Cincinnati State  
Technical &  
Community College



## FRED GRATTO IS REX DILLOW AWARD WINNER

The Rex Dillow Award for Outstanding Article is awarded to the author of the best article published in *Facilities Manager* magazine in the year previous to the annual conference. The recipient of the 2009 Rex Dillow Award is Fred Gratto, of the University of Florida, for his article "Give Me Liberty or Give Me Brick," which was published in the May/June 2009 issue. 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.

Congratulations to Fred for his excellent contribution to the facilities profession.



## APPA EVENTS – 2009

**Sep 15** EFP Prep Course, EFP and CEFP Exams Hilton Head, SC

**Sep 16** EFP Exam Hilton Head, SC

**Sep 20-23** RMA Annual Conference Tucson, AZ

**Sep 26-30** CAPP Annual Conference Grand Forks, ND

**Sep 27-30** MAPPA Annual Conference Iowa City, IA

**Sep 30** EFP Prep Course, Iowa City, IA

**Oct 1** EFP Exam, Iowa City, IA

**Oct 2** EFP Prep Course, Portland, ME

**Oct 3** EFP Exam, Portland, ME

**Oct 4-7** ERAPPA Annual Conference Portland, ME

**Oct 7-9** PCAPPA Annual Conference Hollywood, CA

**Oct 24-27** SRAPPA Annual Conference Daytona Beach, FL

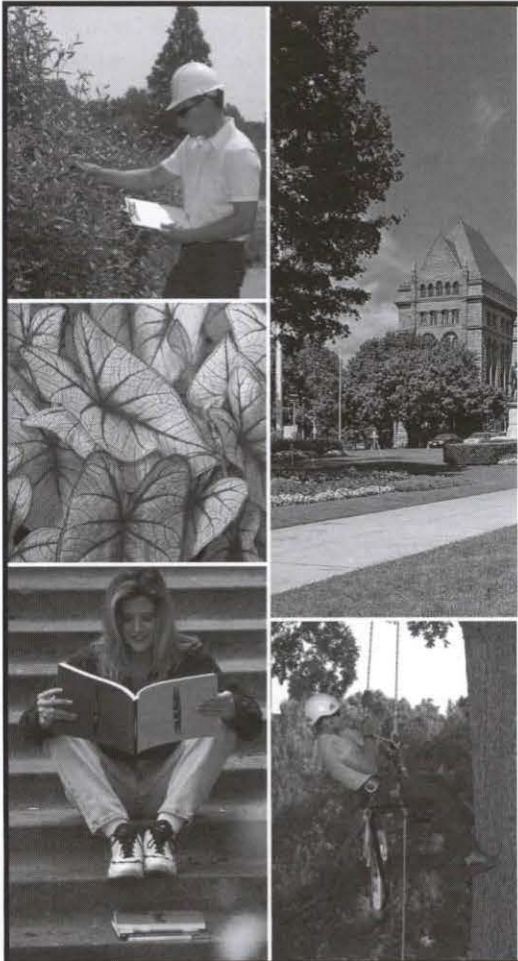
**Oct 27-30** ACUHO-I/APPA Housing Facilities Conference Columbus, OH

## OTHER EVENTS – 2009

**Sep 20-23** Greening of the Campus Conference Indianapolis, IN

**Dec 7-10** NIBS Annual Meeting Washington, DC

For more information or to submit your organization's event, visit [www.appa.org/applications/calendar/events.cfm](http://www.appa.org/applications/calendar/events.cfm).



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# Using the FPI 2007-08 Survey Results to Paint a Picture of our Profession

By Maggie Kinnaman

APPA's Facilities Performance Indicators (FPI) Report for 2007-08 has been available since last February. By the time you read this article you will be participating in the 2008-09 FPI survey. Summarizing the 2007-08 report will help to create a high-level baseline of information about our profession's performance.

First let's look at the demographics related to 2007-08 survey participants. The graph below shows participants by Carnegie Classification.

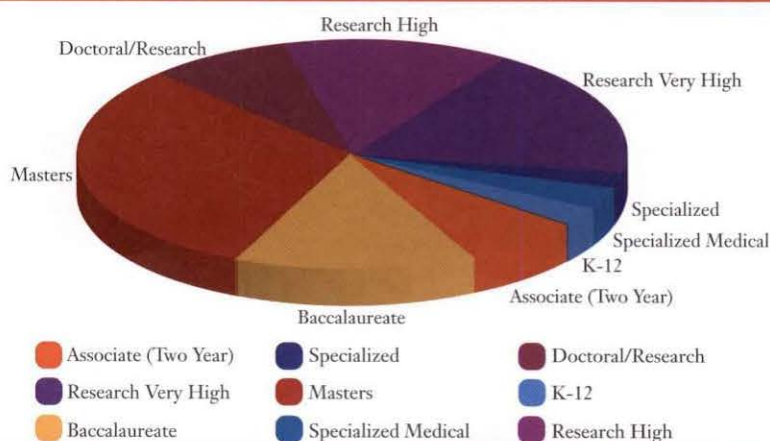
Now let's look at the 225 participants collectively and see how we're able to tell a story about our profession using

the entire cohort averages. I'd like to do this using the framework of the essential question set as shown below. Note that these questions relate to all stages of the total cost of ownership of our campuses and also adds the essential customer and employee perspective.

## WHAT FACILITIES MAKE UP OUR INSTITUTION?

Looking at this question from a very high level, the average gross square footage (GSF) maintained on our campuses is 3,566,144. Additionally the average Current Replacement Value (CRV) for these campuses is \$1,082,350,731, or \$303.51 per GSF.

**Distribution Of Respondents By Carnegie Class —  
Fiscal Year 2007-08 APPA FPI Report**



carnegie class	count
Associate (Two Year)	16
Baccalaureate	32
Masters	69
Doctoral/Research	19
Research High	30
Research Very High	41
Specialized	5
Specialized Medical	7
K-12	6

## IS MY INSTITUTION ADEQUATELY FUNDING THE FACILITIES MANAGEMENT ANNUAL BUDGET?

The survey looks at three ratios as an answer to this question. Facilities Operating Expenditures divided by GSF, Gross Institutional Expenditure (GIE), and CRV. For the purposes of this article we will look at Facilities Operating divided by GIE, which is 6.6 percent. This is saying that on average our participants are expending 6.6 percent of the GIE.

## ARE THE OPERATING FUNDS THAT MY FACILITIES DEPARTMENT RECEIVES BEING SPENT IN A MANNER THAT SUPPORTS DESIRED OUTCOMES?

For the purpose of this report we will look at custodial, grounds, maintenance, and utilities.

- Custodial cost per GSF is \$1.41 and each custodian is cleaning 33,040 GSF.
- Grounds cost per acre is \$5,642 and each groundskeeper is assigned 15.5 acres.
- Maintenance cost per GSF is \$1.55 and each maintenance person is assigned 66,751 GSF.
- The average energy cost per GSF is \$2.61 but special medical institutions are closer to \$5.29 per GSF.
- The average BTU/GSF is 155,939 but special medical institutions are closer to 316,284.

## IS MY INSTITUTION MAKING THE RIGHT INVESTMENTS IN OUR EXISTING BUILDINGS, INFRASTRUCTURE, AND ACADEMIC PROGRAMS?

The average useful life of our buildings for our 225 participants is 54 years. This is how long our buildings support



the academic programs. This would require a minimum investment of 2.1 percent of CRV each year in order to properly invest in our facilities. Our institutions invested 2.085 percent of CRV for a gap of .015 percent.

Our participants' Facility Condition Index (FCI) is 9.4 percent and the Needs Index is 20.4 percent. Remember that the difference between FCI and Needs is the inclusion of renovation, modernization, and plant adaptation in the Needs Index. As a profession, our 2007-08 FPI survey results are telling us that 20.4 percent of our campus space does not optimally support the academic program.

#### ARE CUSTOMERS SATISFIED WITH SPACE AND SERVICES?

This question is obtained from customer service surveys and on a scale of 1 to 5, with 5 being the highest and 1 the lowest, our institutions rated 3.6.

#### IS MY FACILITIES DEPARTMENT DEVELOPING STAFF THAT CAN SUSTAIN EXCELLENCE?

This question relates to employee satisfaction and is based on employee satisfaction surveys. Again the scale is 1 to 5 with 5 being the highest. Our participants averaged 3.3.

Remember that this summary looks at a very high level, basically the average performance for all 225 participants. When the data is sliced by Carnegie Classification or APPA Region the numbers look vastly different.

I encourage you to participate in the 2008-09 survey, which closes in early December. To be competent and credible you must know the answers to the essential questions. ☎

Past APPA President Maggie Kinnaman recently retired from the University of Maryland, Baltimore. She can be reached at [maggiekinnaman@comcast.net](mailto:maggiekinnaman@comcast.net).

Over 450 learning institutions are now realizing the benefits of APPA's FPI performance measurement services. FPI empowers the educational facilities professional with the vital data, statistical references, and reporting tools needed to measure operations and performance, identify capital asset realities, and lead a successful facilities strategy that supports the institution's Mission and Vision.

APPA's newly enhanced FPI survey instrument opened August 31st. The FPI survey and report will be free again this year to all participating members of APPA. You must participate in the survey in order to receive your free copy of the FPI report. APPA is encouraging participants to contact their peers and form cohorts in order to provide participants with more meaningful, robust comparison data. For more information, please contact APPA staff member Christina Hills at [christina@appa.org](mailto:christina@appa.org) or visit <http://www.appa.org/research/FPI/index.cfm>.

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By Ruth E. Thaler-Carter

# Optimism and Strategic Renewal

Today's challenging economy affects everyone, including APPA and its member institutions. In such trying times, institutions and organizations need strong leadership, optimism, and a willingness to revisit basic principles—and that is exactly what Polly Pinney plans to bring to APPA as its new President. Her theme for her presidential year, "Honing the Brilliance—A Time of Strategic Renewal," makes her focus clear.

## AN UNTRADITIONAL START

Pinney, executive director of facilities management at Arizona State University in Tempe, came to facilities management from an untraditional route, and the same can be said about her path to her current professional position and her role in APPA. "I'm really delighted that the opportunity to become an educational facilities manager came my way—it's one of the most interesting jobs one could have—but, like many colleagues, I didn't set out to go into this field," she said. "In college, my first thought was that I would get involved in management, although I was also interested in the theatrical world; I always wanted a position where I would have a strong impact on an organization. I began this journey on the administrative side of the house, in labor relations and organizational development. From there, it was a short trip into facilities management."

One reason Pinney thrived in the field is because, she said, "I'm constantly challenged. For someone who has a rapid boredom level, that's a real plus."



## AN INSPIRING CAREER

Pinney's "untraditional route" to her career in facilities management started with a bachelor's degree in theatre and communications and a master's degree in management, both from the University of South Dakota. She started out as a director of human resources and director of training and development for the South Dakota Department of Labor. She joined ASU in a labor relations position for Facilities Management. Once launched in facilities management, she made steady and impressive progress toward her current position: previous positions include manager, assistant director, associate director, and director in the facilities management department.

She has taken her professional education seriously. Pinney is a graduate of APPA's Institute for Facilities Management, Leadership Academy, and HERS-Mid America Institute for Women in Higher Education Administration at Bryn Mawr College. Areas of responsibility under Pinney's management have garnered six Governors Awards for Excellence, and she has been listed twice as one of the Outstanding Young Women of America.

Beyond her formal position, Pinney has demonstrated a deep-seated commitment to furthering professionalism both at her campus and throughout the field. In 1986, she developed and implemented the Physical Plant Supervisors Institute at ASU Facilities Management, the first supervisory academy specifically for physical plant supervision. She also developed and implemented an in-house Apprenticeship Program for ASU Facilities Manage-



PHOTO BY RHONDA HOLE

## THE PERSONAL PERSPECTIVE

Pinney takes her facilities management skills to communities outside ASU and APPA. For five years, she taught on issues related to the management of facilities organizations and strategic planning to facilities professionals in the Salt River Pima Maricopa Indian community.

In addition to her deep involvement with RMA and APPA, Pinney also is an active local, state, and national member of the Association of Business and Professional Women. She also gives backs to the community by teaching résumé writing and interviewing skills at the Chrysalis Battered Women's Shelter.

There is, of course, more to Pinney than her dedication to



PHOTO BY TOM STORY

Left, Pinney accepts the presidential gravel from Bill Elvey. Above, the ASU facilities team.

# A Profile of President Polly Pinney

ment. Over her 23-year career, she has contributed to the facilities profession through speaking, writing, and teaching.

Pinney's APPA involvement is well-known to readers of *Facilities Manager*. Before becoming APPA President at the Vancouver annual conference, she served as APPA's Vice President for Professional Development; also served on the Rocky Mountain Association Board as RMA representative to the Professional Development Committee; was co-chair of the Welcome Committee for the APPA Educational Forum 2002 in Phoenix, Arizona; conference director for RMA's 2003 conference in Sedona, Arizona; speaker at regional and national forums on multiple occasions; was a facilitator for the Supervisor's Toolkit for RMA; is on the faculty of the Institute for Facilities Management; and was chair of the APPA subcommittee charged with redevelopment of the annual meeting, which presented its new format at APPA 2007.

her job and her professional organization. Her daughter Hillary (named after explorer Sir Edmund Hillary of Mt. Everest fame) and her sister Connie are "my heart and my soul; my support system," and have both been integrally involved in Pinney's life in APPA. "APPA has become a part of me, so it's appropriate that they become part of APPA," she said.

In her rare off time, Pinney enjoys cooking: "I find it relaxing. I enjoy the creativity, from the preparation to the presentation to watching people enjoy what I've done." She maintains her early interest in the theater and loves to travel.

## SUPPORTING WOMEN IN THE FIELD

As a woman in what remains a male-oriented field, Pinney can remember when an Institute class consisted of "a couple hundred men and a handful of women." Lander Medlin and Maggie



Kinnaman were essentially the only women in visible positions in the profession and in APPA—"the numbers were few and far between. I have witnessed real growth in the diversity of our profession and field," she said. "That has been a real joy. Women have become not only more visible, but real leaders. It's very rewarding." And APPA has played an important role in that progress: "APPA has been a genuinely welcoming organization for women in many ways," Pinney said. "Diversity really enhances our dialog as professionals."

To ensure that other women have similar opportunities, Pinney is one of the founders of ASU's University Career Women. She is committed to continuing APPA's progress in diversity, in particular for women in the field. In 2008, she was one of a delegation of APPA members participating in CHEMA Women's Leadership Institute, a new program designed in collaboration with seven collegial associations that is targeted to women seeking to become senior leaders in higher education administration. She has recommended that APPA continue its collaboration on this endeavor and looks forward to "adding this opportunity to the rich fabric of programs we offer our members."



Pinney, right, with sister Connie and daughter Hillary.

Pinney is committed to inclusion and diversity in the profession and the association in all ways. She sees inclusion as vital to the future of APPA and the success of its members and their institutions. "APPA's leadership must create a climate of inclusiveness and collaboration where voices will be heard, ideas will be shared, and the business of change and growth can occur," she said in her platform. "This will require each of us, as members, investing in the future of our organization." By focusing on such collaboration, she says, "together, we can create greatness."

#### ENCOURAGING THE NEXT GENERATIONS

For Pinney, facilities management remains an exciting, fulfilling profession, and is one she wholeheartedly recommends to current students. "I think educational facilities places people in the most interesting position anyone can have, and in an ever-changing, vibrant environment," she said. "A college campus has so much to offer in technology and the cutting edge of contemporary society, and facilities management offers ways to make things happen. When a faculty member has an important invention or creation, we have a piece of it—



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“APPA's leadership must create a climate of inclusiveness and collaboration where voices will be heard, ideas will be shared, and the business of change and growth can occur”

we created that lab, that building, that environment that could make it happen.”

Citing the rapidly changing workforce demographics that “challenge APPA's programming models to stretch to meet the wants and needs of a new generation of facilities professionals,” Pinney used her presidential platform to call on APPA to “recruit, welcome, and retain these individuals with programs suited to their needs and style of learning, as well as strong mentoring programs to support them. We must embrace and explore new ideas and methods, while still retaining our passion and respect for the past,” she said.

#### COMING UP THROUGH APPA

Pinney first got involved with APPA in the 1980s through the encouragement of her boss at the time, Val Peterson. She started out as a member of the Rocky Mountain region, and her first contact with APPA was as a speaker at an international conference on gender communications. “My growth through RMA began as co-director of a conference, and the same happened with APPA,” she recalled. After she became a trainer for APPA's Supervisor's Toolkit program—“I love to teach that!”—she was elected to the Education Committee and had the opportunity to be a candidate for Vice President for Educational Programs. “That gave me the opportunity to see all aspects of APPA and its services to members,” she said. “I am a product of APPA development.” Topics that appealed to her then and remain vital to her today include educational and leadership opportunities offered by both

the RMA and APPA. “These are what built the foundation for my career growth.”

APPA Executive Vice President Lander Medlin and Past President Maggie Kinnaman take lead roles among those whom Pinney appreciates as role models in her professional career and her APPA involvement, in addition to Val Peterson, past APPA President and her boss at ASU, who encouraged his staff to be involved in APPA. “So many individuals have been instrumental for me, as



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friends, colleagues, and mentors,” she said. “Each APPA President I’ve had the privilege of working with has been instrumental in teaching me, developing me, and I must thank Chris Ahoy in particular for his ongoing encouragement and support.”

Pinney remains deeply loyal to and appreciative of her RMA roots. “You never forget the person who brought you to the dance and, for me, that would be the RMA,” she said.

That involvement has given Pinney education and leadership opportunities in her profession that cannot be matched anywhere else, as well as resources that come only from active participation in one’s professional association. “A degree and formal training gives you the background and knowledge, but on-the-job gives you the bedrock of your leadership skills,” she said. “The sheer fellowship of colleagues you meet through APPA gives you a rich network—there’s always someone to turn to. You can’t have a successful career without such a resource.”

#### CAMPUS CONCERNS, APPA RESPONSE

At ASU these days, Pinney faces the same challenges as many, if not all, APPA members and institutions. “The essence of this economy for our campus is extreme change with few resources. ‘We are a rapidly changing, ever-evolving campus. It’s the greatest ride you can take if you can stay on the pony. The challenge is to continue to serve with excellence.’”

Like many of her colleagues, Pinney has had to lay off staff and reduce her workforce this past year, and has lost “considerable” budget dollars. At the same time, “the campus is growing incredibly fast, and demands for service are not changing. We must continue to provide services when technology is changing incredibly rapidly as well. We must provide skills and training to respond to new technology needs. Keeping our organization positioned to meet the changes is that largest challenge of all.

Pinney sees the current economy issues from several perspectives, all practical and pragmatic. “We need to remember that, after the rain, the sun always comes out,” she said. “One of the key roles for APPA will be to maintain a balance and keep serving the membership regardless of the economy. Our members are financially and resource challenged, yet they are growing—universities always increase enrollment when the economy is down.”

As she said in her APPA 2009 conference remarks, “In these turbulent and somewhat daunting times of ‘heat and pressure,’ it may be tempting for us to retreat to our campuses and try to hold steady and stem the tide by concentrating solely on our financial struggles or our immediate organizational needs. While I must admit this is certainly a needed response, I would assert that, at just such moments, we need to do much, much more.”

In response to the current challenges, “APPA has to find ways to help members cope. We have to stay on top of what’s hap-

pening and find ways to enhance our resources and those of our members. As an organization, we have to build new programs and resources, and use technology effectively.” She laid out her planned approach in her 2009 conference presentation: “We will search for opportunities to work smarter and more efficiently; to partner and leverage our services; and to expand our services and make them more accessible at all levels.”

What Pinney said in her election platform remains the case more than a year later, and will remain a focus in the coming year: “A diminished financial picture for many of our colleagues will mean we must be ever-vigilant to offer services in accessible formats and will challenge the organization to seek ways to ensure financial strength as we change and grow.”

Most importantly, Pinney said, neither APPA nor its members can give up or give in. “If we wring our hands and look only at the dark side, we will lose,” she said. “We must be ready for the time when the sun comes out.”

To make that preparation, Pinney is looking at her presidency as a year of strategic renewal. “It is my belief that this organization can survive and thrive,” she said. She agrees with the philosophy of Simon Bailey, who has said that organizations and individuals are “uncut diamonds, formed by heat and pressure, waiting to be polished to brilliance.”

Said Pinney, “It is time for us to look at APPA’s key principles in terms of where we are and where we’re going—to revisit and renew our understanding of and commitment to those principles. This fits into our key roles within APPA and how we assist our members. The heat and pressure we are experiencing creates an opportunity for us. An opportunity to revisit our services and our strategies, to assure we are on track to help our members hone the brilliance of their team members and their organizations.”

#### A POSITIVE PLATFORM

Pinney may be an optimist, but she is also a realist. “APPA has provided me with superior educational programs, cutting-edge tools, opportunities for growth and enrichment, and a rich network of valued colleagues and mentors. The times we now face will require all of these things and more for success.”

Pinney believes that not just strategic planning but strategic renewal will be key to APPA’s success in these difficult times. “The APPA organization thrives on a strong strategic direction with the 7 Key Strategies,” she said. “However, we are not done yet. APPA faces organizational challenges as well. I will continue to strongly support and promote the development and completion of the initiatives posed by the 7 Key Strategies. These are integral to position APPA as an organization for the future.”

Based on her belief that “a strong organization must be nimble enough to react and change to meet the needs of both




current and future members," she is committed to supporting APPA's certification initiative and the development of programs for the recruitment, education, and mentoring of our future professionals," because "strong offerings in these areas will enhance our membership expansion efforts and bring new ideas and perspectives to us all."

Because "the strength of APPA is in the collaborative relationships throughout all segments of the APPA community," Pinney also has pledged to work to strengthen relationships, communications and collaboration between APPA international, the regions, and state and local chapters. "Our strength in this area lies in our ability to meet many needs in many places," she said. "To do this, we need to work diligently at communication. One of our greatest challenges is to create strong, vibrant channels of communication both internally and with our peer groups, such as NACUBO and SCUP."

#### LOOKING TO THE FUTURE

Recalling that, on being asked to serve the APPA membership as Vice President for Professional Development, she said, "I'm listening," Pinney used her platform to ask members to "allow me to serve you. Please know: I am still listening." Now that she is APPA's President, she is speaking out as well as listening.

Pinney called on APPA members to remember that "APPA and the network of information, assistance, and strategies it offers are even more important as we all work to keep things on track and polish our diamonds. Thanks to a visionary foundation begun by Jack Colby and carried forward by Chris Ahoy, Alan Bigger, and Bill Elvey, we have a strong core of programs built on strategic assessment. Inside every challenge is an opportunity waiting to emerge. We will need to explore reinventing ourselves to meet the times and needs."

Despite the challenging times, Pinney believes that "APPA's future is extremely bright. If we are careful stewards—all of us, every member—and join together to share our ideas and needs, we can use those ideas to meet those needs," she said. "One of my roles as President is to see that APPA not only survives, but thrives. "We are uniquely positioned to be the partner that helps our members and their institutions cope." 

Freelance writer Ruth Thaler-Carter is a regular contributor to *Facilities Manager* and can be reached through [www.writerruth.com](http://www.writerruth.com).

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# Strategic Decisions & Staff Collaboration Highlight the 2009 Award for Excellence Winners

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The Award for Excellence is based on a set of criteria, which include:

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- Customer Focus
- Information and Analysis
- Development and Management of Human Resources
- Process Management
- Performance Results

Evaluation for the award consists of two parts: a self-evaluation addressing specific, stringent criteria, and a site visit by a team from APPA's Professional Affairs Committee to confirm the accuracy of the self-assessment. Applying for and receiving the AFE is no small task for an institution. It takes teamwork from everyone within the facilities organization and requires coordination and motivation from the top levels of leadership.

This year, four schools applied for the award, and the Professional Affairs Committee selected three for recognition. View past winners at [www.appa.org/recognition/excelwinners.cfm](http://www.appa.org/recognition/excelwinners.cfm).





## PHILADELPHIA UNIVERSITY

BY J. THOMAS BECKER, P.E., EFP

*Tom Becker is the assistant vice president for operations at Philadelphia University, Philadelphia, PA. E-mail him at [beckert@philau.edu](mailto:beckert@philau.edu). This is his first article for Facilities Manager.*

Philadelphia University (formerly Philadelphia College of Textiles and Science), founded in 1884, is a private university with 3,100 part- and full-time students. The university offers more than 50 undergraduate and graduate degree programs within the architecture, design, business, engineering, textiles, fashion, as well as the science and health fields.

Physical Plant is proud to be responsible for the basic operation and managed care of the 52 buildings on the university's 100-acre main campus. Our intention toward comprehensive stewardship allows our historic 100-plus-year-old mansions to be enjoyed alongside more recently constructed modern and architecturally award-winning academic buildings. The facilities inventory tallies just over one million square feet, with buildings dating from 1779 to 2006.

In 2002, the university invited the APPA Facilities Management Evaluation Program (FMEP) process onto our campus. We accepted the 40 recommendations of the final report and formulated a departmental strategic plan to progress the facilities function of the university in alignment of those recommendations and APPA standards.

Steady progress has been made, and while we recognized that a goal of "showplace facility" was beyond the institution's economic priorities, we believed our current performance aligned well with the qualifications of APPA's Award for Excellence and thus submitted our application.

### PHYSICAL PLANT OVERVIEW

Philadelphia University's Physical Plant Department consists of coordinated teams of skilled professionals that work around the clock to support the department's mission of customer satisfaction and facilities stewardship. This overview appears right on our Web page and is intended to provide our customers with an explanation of how these services are managed and integrated.

The university's plant managers and engineers are active members of APPA, which provides leadership in educational facilities. We use this relationship to help establish guidelines for our

The Physical Plant Team of Philadelphia University



operation, share our ideas with fellow institutions, understand state-of-the art concepts, and to benchmark our effectiveness.

Our organization is actually a hybrid of university employees and contracted services. It can best be explained as a three-leafed plant or a version of a "Shamrock Organization," as described by management consultant and author Charles Handy.

- The main leaf and core stem of the Plant are a concise team of over two dozen direct employed university staff, managers, and professional engineers.
- The second leaf of the Plant consists of contracted managers and employees that have a certain specialty and are here on campus on a daily or routine basis. Housekeeping, grounds, and portions of our HVAC are handled in this manner. Other specialty contractors include elevator maintenance, pest controls, and licensed fire detection certification firms, etc.
- The third leaf of the Plant primarily comes into use for construction and project related activities where large workforces of skilled employees or trades are needed for an intermittent time, as well as for emergencies. Project related contractors are pre-qualified and then the work is bid by invitation. For emergencies the university maintains Memos of Understanding contracts with several contractors for quick response when needed as recommended by FEMA practices.

For ease of operation and single point of contact, the second and third leaves of the plant are managed by the first. From a customer standpoint this relationship is intended to be seamless. A link to our organizational chart is posted for a more thorough understanding of the specific responsibilities of each individual within the department.

Our multi-craft maintenance technician teams are organized by campus location or "zone." This zone maintenance approach allows for coordinated response and "employee ownership" of the facilities as well the familiarity with the actual customers.

Physical Plant completes over 12,000 work orders per year. All of our staff can be reached by radio through our office and Central Dispatch. In order to plan and schedule effectively, work orders that take more than an hour or so are assigned to the multi-craft zone maintenance teams, while shorter assignments and emergency



repairs are assigned to RAM techs. RAM techs are multi-skilled individuals that are assigned mobile carts for quick response and work around the clock to handle our **Right Away Maintenance** needs.

From a customer standpoint anyone on campus can submit a request for anything that needs a normal repair through our menu-driven *i-service* Web-based work order system. Normal repairs generally are completed within a week's time or sooner. By using the Web-based work order system customers receive automatic updates and the customer tracking feature for any of their own open work orders.

#### KEY STRATEGIC IMPROVEMENTS

Val Peterson and Bob Lashaway of the 2002 FMEP review team appreciated the department's devotion to the university and provided concise constructive suggestions for opportunities for improvement. We owe both of them a debt of gratitude.

While we understood and accepted all their recommendations, the priority for university resources required us to think outside the box and combine some innovative methodologies to get to the desired end result.

The faculty, staff, and students here are really great to work with. We took some risks, pushed out some new programs, and became a lot more transparent.

It all seems to be working. Customer satisfaction is high,

employee morale is improved, work order backlog has been cut to one-fourth, and costs have stayed in line.

- **Leadership.** The department was realigned, two key management positions were added, and we filled our director of physical plant position, which oversees the daily operation. Our mission, vision, and organization chart now reside on the department's Web page.
- **Strategic and Operational Planning.** We took every one of the 40 recommendations, determined a method to address each one, and prioritized them into three levels. This document then flowed into a more concise five-year department strategic plan that was reviewed with the president and formally signed off by the vice president of finance and administration, the associate vice president for operations, and the director of physical plant. After six and a half years we have substantially addressed 37 of the 40 recommendations. We are now doing a new plan.
- **Customer Focus.** Our department mission is simple: *Customer satisfaction and facilities stewardship*. That really says it all. But we did not approach this goal from a traditional facilities model. We borrowed from our industrial experience and married this with state-of-the-art customer communications methodologies.
  - RAM techs. Our symbol is the "Ram," so implementing 24 hour on-site Right Away Maintenance technicians that

normally respond within 15 minutes of an emergency call is campus spirited and easy to remember. This was a leap of faith as it meant reassigning unsupervised dayshift staff to do office PMs on second shift, and classroom PMs on third shift in order to be available for these emergency calls.

- ***I-service* direct student work order interface.** We advocated for the software to be LDAPP capable so that now every student and all faculty and staff can directly submit and track their own work orders on a 24-7 basis.

- **Automatic work order e-mail updates.** Every work order automatically generates e-mail status updates to the customer as it progresses. Acknowledgment, approval, and completion with satisfaction survey and a follow-up link. Additional communication occurs if the work order is delayed for parts order or if it is deemed as a new or capital request, which requires additional approvals and possible funding.

- **Information Analysis.** We realigned our budget allocations and the KPIs we track to align with measurements that allow us to compare ourselves to the

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benchmarks that APPA compares, and to APPA's *Maintenance Staffing Guidelines for Educational Facilities*. In fact, our annual reports include a plot of the matrix status right on the APPA chart. These reports go to all plant administrators, the president, and the finance vice president. The progress is shared on a quarterly basis with all crew members.

- **Development and Management of Human Resources.**

- o **Flexibility.** We have increased our staff as we have added square footage, but we are still sparsely staffed by recommendations. Our shamrock organization allows for well managed supplemental contracting when required to maintain our work order backlog at the desired level. This backlog is itemized by staff member and monitored weekly in a management meeting. Our goal is to remain at a one-week backlog, which has been reduced from the one-month level in 2002.
- o **Student participation.** In addition we oversee a substantial student workforce that includes interns as well as a 25-member summer paint crew that is factory trained annually by Benjamin Moore. This builds student pride in our facilities and opens communications. Department time spent on vandalism is less than 1 percent.
- o **Development.** We never leave any development money on the table. With a small facilities team we need the best training possible. Everyone at every level is encouraged to participate at least annually in addition to quarterly in-house training programs. Internal progression is expected.
- **Process management.** While plant management has been discussed to some extent, improvements with purchasing and project management were also implemented. Building standards documentation was enhanced and every print was digitized for electronic access and redundancy. Our electronic

inventory of RFPs was increased, and FEMA standards were utilized to develop a concise, but complete inventory of MOUs for emergency response. In addition Physical Plant was a leader in a campus-wide voluntary environmental compliance program with a consortium of universities organized by AICUP.

- **Performance results.**

- o **Paradigm shift.** The intuitive conclusion to placing almost one-third of the staff on shift, and in RAM-tech positions that are available for emergency response, would be an increase of emergency work orders. In actuality by also assigning the PMs to those positions (when the classroom and offices were actually available) there has been a drop in service calls from 44 to 23 percent. Since we also run RAM-techs on dayshift, it has also allowed our day-shift zone maintenance to complete more in-depth service work without interruption. We start the day on a level playing field and our emergency number is not stressed.
- o **Customer satisfaction.** Our department is appreciated and complaints are rare. Statistically a fraction of a percent.
- o **Facilities stewardship.** We are privileged but challenged to have buildings that range in age from three to more than 300 years. Our weighted age is approximately 43 years. Our vision is to evolve our condition from "managed care" to "comprehensive stewardship." We are getting there.

In summary, having the AFE validation team of Jodie Sweat of Kennesaw State and Dave Gronquist from Kansas State take time away from their campuses and families to visit our campus, converse with our staff and customers, share their experiences, and confirm that we have made the progress we set out to accomplish was a reward all in itself. We really appreciate their dedication to the profession and the time they spent with us. We covet this acknowledgment, are all still beaming, and will continue to move forward.

## UNIVERSITY OF NORTH FLORIDA

BY MATTHEW M. TAYLOR

*Matthew Taylor is director of physical facilities at the University of North Florida, Jacksonville, FL. He can be reached at mmtaylor@unf.edu. This is his first article for Facilities Manager.*

The University of North Florida (UNF) is a young university having been established in 1972 and is growing rapidly in size and stature. UNF has expanded from a handful of buildings at the end of a dirt road to a thriving campus with five colleges in a bustling section of Jacksonville, Florida. While maintaining its small-campus



appeal, the campus is located midway between downtown Jacksonville and the Atlantic Ocean. President Delaney stated, "The university is on a journey to greatness that will be guided by our commitments to excellence, focus, relevance, and accountability."

UNF is a public institution with a student enrollment of over 16,000 and aspires to be a pre-eminent institution of higher learning serving the North Florida region at a level of national quality. UNF has over 3 million square feet (including housing) in over 50 buildings on 1,300 acres, with over 150 acres developed and a 300-acre preserve.

The university's theme is "No one like you. No place like this." As a support organization, we are designed to provide the atmosphere for our primary key stakeholders; students, faculty,



Matthew Taylor, left, accepts the FM AFE from Bill Elvey.



and staff. Students and faculty alike have different requirements and it's our responsibility to find a median service capability to meet both needs. We must ensure that the

classrooms and labs are conducive to providing the teaching and learning experience desired. We must ensure that the staff facilities are maintained in a manner that meets their needs. Our goal is to ensure our facilities are representative of "No place like this" both inside and out.

Recognizing that an educational institution's reputation is built on two major elements, the academic excellence of the faculty and physical environment in which the educational process occurs, we strive to provide an impressive and functional physical environment that will aid in attracting quality faculty, staff, and students. The university is educationally accredited by the South-

ern Association of Colleges and Schools (SACS) and recently completed the onsite evaluation for reaccreditation.

Our goal is to increase customer satisfaction, create an environment that helps attract and retain employees, faculty, and students and recognize Physical Facilities' contribution to the overall efficiency in maintaining the UNF physical plant. To that end, our mission effective July 1, 2009 has been updated to: "The conservation and stewardship of campus assets while providing comprehensive quality customer service to the campus community." To do that, we work in concert with Facilities Planning, Environmental Health & Safety, and ADA departments to ensure that the university operates and maintains physical facilities that are adequate to serve the needs of the institution's educational programs, support services, and other mission-related activities.

A major emphasis of Physical Facilities is to protect the environment and to conserve and protect our resources, especially the natural beauty of our campus. Management of the Sawmill Slough Preserve is a responsibility of Physical Facilities. Our responsibilities include approving research and other activities in the Preserve, developing a Natural Areas Management Plan, and managing the Preserve according to the Natural Areas Management Plan. Particular concerns for Preserve management are exotic pest plant control and the need for prescribed burns in the pinelands.

Physical Facilities is a Division within the Administration &



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Finance Division. The director of physical facilities reports to the associate vice president for administration & finance, who reports to the vice president for administration & finance. The senior leadership comprises the director, associate director, professional engineer (assistant director), and two assistant directors. We presently have 216 authorized positions to provide the services necessary to maintain the university resources of over two million square feet of a gross square footage that exceeds three million square feet. Our maintenance support does not include Housing, which maintains its own space.

We are regulated by federal, state, and local agencies for code, health and safety, financial, environmental, and product regulations. We have an active safety program administered by Environmental Health and Safety. Monthly safety meetings are conducted and offer a variety of topics, guest speakers, etc. We have a variety of business partners, suppliers, and distributors that provide the products and services. We continually look for better products and materials that make our job easier. These partners, suppliers, and distributors are also key stakeholders.

Physical Facilities has several major information systems in place to assist with our operations. Our Computerized Maintenance Management System (CMMS) provides management of our service requests/work orders, major and minor projects, preventive maintenance program, space management, the utilities' billing system, and the key module. Preventive Maintenance (PM) work orders are set up in the system for both equipment and facilities and historically make up approximately 50 percent of our work orders.

Our irrigation management system is a computerized system with wireless connection to 15 irrigation controllers around campus. The irrigation specialist and crew manage the system and are the primary users. It offers them more efficient use of staff time in identifying problems, better weather controls, and reduces the travel time to monitor controllers. As a result of the implementation, we expect additional reductions in water consumption for irrigation.

Our Engineering Department utilizes desktop and 3D CAD applications. The desktop application is used to manage building floor plans and data files, while the civil 3D is used to manage campus site plans.

Maintenance and Utilities employs a state-of-the-art Building Automation System (BAS). The system fully integrates, monitors, and controls temperature and environmental conditions within campus buildings, monitors exterior and interior lighting, building security, CCTV, elevator interface, lift stations, generators, and fire alarm. The system monitors and controls varied critical and routine operating functions on campus without staff input.

The fire alarm system provides a single-source application for life safety monitoring of campus buildings. The system is centrally monitored and supervised 24/7/365 by the University Police Department and is fully integrated into for secondary monitoring by Physical Facilities maintenance staff.

The elevator monitoring system is a computerized platform that facilitates the monitoring and collection of data from

third-party or proprietary elevator controllers. It is interfaced with the control system to allow real-time alarm monitoring of elevator status, position, or alarm condition.

Our two administrative systems impact the division and the university community. The fuel master system is a state-of-the-art fuel dispensing and tracking system that provides historical record of fuel transactions and monitors fuel usage. Usage is restricted to all campus owned vehicles that can be fueled via the system and is used to recharge all campus users. Our timekeeping system is interfaced with another program for payroll purposes. It was implemented in 2005 and was an instant time saver.

Many of our key challenges result from the university vision. We continue to have challenges in recruiting quality staff that are multi-talented. Our biggest challenge at present is determining how we can maintain the required standard level of service while facing continuing budget reductions. Our vertical transportation is challenging at times, especially with new units that are proprietary and have operating issues. Keeping staff motivated during these times of economic misfortunes impacts the morale of the division.

Maintaining facilities and grounds can be challenging. Except for emergencies, we must remain compliant with the noise restrictions in certain areas of campus so as not to interrupt or disturb classes when getting close to facilities. By adjusting work schedules and implementing a night shift, we have overcome some of these challenges. Having a staff that is highly creative certainly helps with meeting these challenges.

Our strategic goals and continuous improvement requirements support the university strategic goals. Peer institutions are utilized to compare capabilities and these vary depending on the situation. We have used the University of Florida, University of South Florida, University of Central Florida, Florida Atlantic University, Florida International University, Florida State University, Florida A&M University, and the University of West Florida for various issues.

Our successes are determined by several means:

- Working within our budget
- Energy savings as a result of improvements
- Work order survey
- Decreases in refuse processed through recycling rather than going to landfills
- Reduction of expenditures based on improved operating methods
- Feedback from the campus community
- Meeting or exceeding our goals

We have redefined our standards to coincide with the APPA standards. The Custodial and Maintenance standards have been implemented and we have begun the development standards for Landscape and Grounds. We have also utilized *Lean* processes and techniques for process improvement. We recently enhanced our quality control functions by establishing quality inspector positions that inspects, evaluates the work completed and meets with customers to determine their satisfaction with the service provided based on their service request.



## UNIVERSITY OF WEST GEORGIA

BY DAN LEWIS AND MICHELLE ERTZBERGER

*Dan Lewis is coordinator of business and finance development, campus planning and facilities, at the University of West Georgia, Carrollton, GA. E-mail him at [dlewis@westga.edu](mailto:dlewis@westga.edu). Michelle Ertzberger is administrative assistant in the same department; she can be reached at [mertzberger@westga.edu](mailto:mertzberger@westga.edu). This is their first article for Facilities Manager.*

Beginning as an A&M school in 1906, the University of West Georgia (UWG), is a coeducational, residential, liberal arts institution located in Carrollton, Georgia.

Over the years, UWG has expanded to be the fifth largest campus within the University System of Georgia, encompassing 645 acres, 84 buildings, and 11,700 students.

UWG's campus is a unique blend of old and new featuring a front portion of the campus that is dotted with structures built in the early 1900s, while the remaining portion exemplifies the more contemporary modes of architecture. The campus is also considered to be one of the most beautiful of the 35 institutions that comprise the University System of Georgia, continuing the long tradition of systematic landscaping that began in 1919 when gifts of trees from each of the then 48 states were transplanted on campus.

UWG's department of Campus Planning and Facilities (CP&F) consists of the Office of the Assistant Vice President for Campus Planning and Facilities, Campus Planning and Development, Risk Management/Environmental Health and Safety, and Facilities and Grounds.

CP&F has a staff of 140 employees whose mission is to professionally operate, maintain, and support the development of quality facilities, grounds, and services, and to support the campus community, students, faculty, and staff.

Campus Planning and Development provides architectural, engineering, and project management services for all planned projects and contracted work on campus. The department's versatile and skilled staff serves in project management, design, renovations, additions, utility, and infrastructure improvements. In addition to providing quality work and customer satisfaction, their goal is to serve the campus community in a professional, efficient, and effective manner.

To ensure that all activities that occur on campus either meet

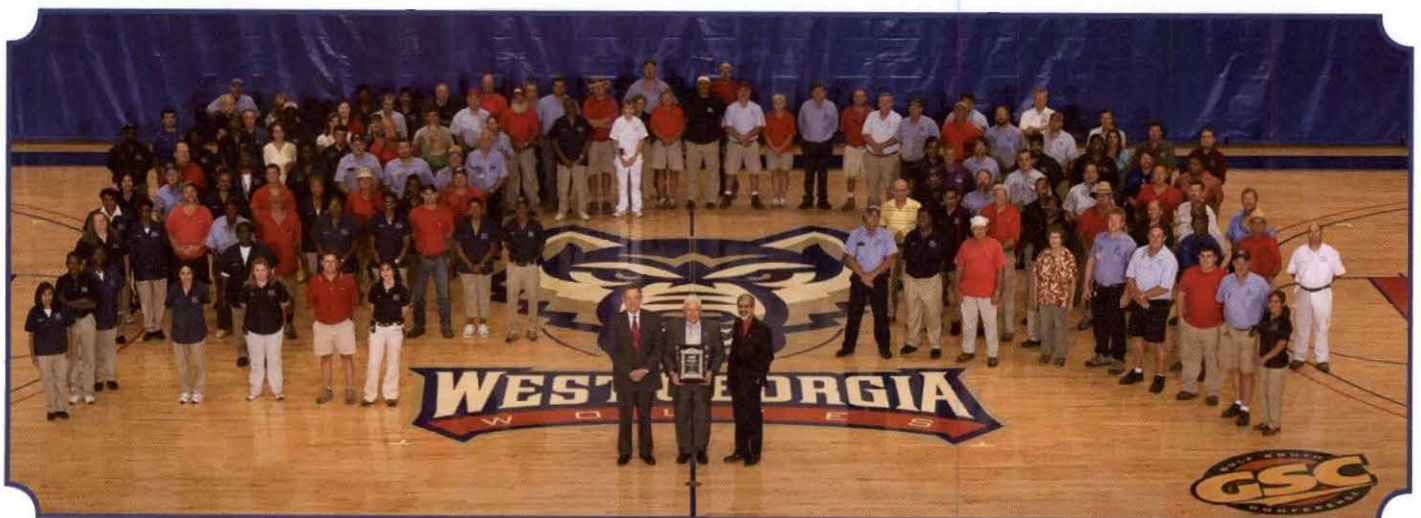
or exceed requirements mandated by local, federal, and state agencies, Risk Management/Environmental Health and Safety was developed under the CP&F umbrella in 2000. Since then they have expanded their mission to protect UWG's students, visi-

tors, faculty, and staff through training, education, risk assessment, and mitigation.

Facilities and Grounds comprises the work information center, maintenance, motor pool, custodial services, moves/setups, paint shop, construction and landscaping, and grounds maintenance. The functions of repair and routine maintenance, energy management, and special projects are scheduled, performed, and managed for the more than 2.1 million square feet of building floor space.

Assistant Vice President Mike Renfrow believes that the Malcolm Baldrige criteria that was adapted by APPA for the Award for Excellence (AFE) was one of the key factors that helped to provide change and clarity for CP&F leadership. "We had adopted the Baldrige criteria in 2003 while performing a self assessment with another state agency. When APPA later revised the AFE to assess similar criteria, we felt confident in applying for this award as we had three years worth of trends developed in several performance measures."

Mr. Renfrow also points out the organization's continuous improvement efforts as a pillar of strength. "As early as 2000, CP&F



The University of West Georgia Facilities Team.



has employed the NACUBO-endorsed template of BPR as its tool for process improvement." BPR is the acronym for Business Process Redesign, and CP&F has identified 25 core processes and over 100 sub processes over the last eight years and is constantly seeking ways to make them more efficient and effective. In 2006, CP&F received three best practice awards from SACUBO for our efforts in BPR and continue to assess an average of 15 processes per year.

CP&F takes great pride in creating an environment that promotes, endorses, supports, and allows ordinary people to do extraordinary things. Sprinkled throughout this organization

are several examples where experience, encouragement, and empowerment have helped CP&F to advance the processes that are deployed while maintaining its focus on supporting UWG's over-all motto of *Educational Excellence in a Personal Environment*. In keeping this tag as its compass, CP&F has constructed a working environment that strives for:

- Professionalism in its services. This is achieved through the guiding principle of "doing what is right," employee training, benchmarking, and keeping its focus on their three primary customers: students, faculty, and staff.
- Increased employee input, involvement, and development. This is accomplished through regular employee meetings, an annual survey called "Organizational Trust," a monthly newsletter, and annual performance appraisals.
- Continuous process improvement. BPR has enabled CP&F leadership to incorporate changes in technology to help eliminate non-value added steps and improve efficiency and effectiveness. In addition, Six-Sigma methodologies were introduced in FY09 in support of Chancellor Erroll B. Davis' challenge to implement systematic process improvement efforts across the campuses in order to improve effectiveness.
- Customer assessment. Having administered manual surveys since 2000, CP&F initiated an annual electronic survey for all three areas beginning in 2006. In 2007, the Work Information Center also implemented a five-question survey for each work order performed. Since that time, the

response rate has steadily increased, and feedback is provided to CP&F leadership on a monthly basis.

- Benchmarking with others. Over the past decade, CP&F has participated with APPA using the strategic assessment model, the facility performance indicators, and the APPA Award for Excellence. They have also benchmarked with others using such assessment tools as the University System of Georgia Peer Review, EPA Self Audit, and the Georgia Oglethorpe Award Inc. – a Malcolm Baldrige-based template.

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CP&F continues to use the aforementioned methodologies in addressing higher education challenges such as increased enrollment, soaring energy costs, and limited funding.

With an increase in enrollment, square footage, and acreage, work requests have soared by 35 percent over the past two years while facilities personnel has been reduced. Work orders per facilities FTE increased by 10.7 percent in FY08 and an additional 18.7 percent in FY09.

In the past five years, CP&F has invested in a mechanical engineer, energy controls, and implementing government recommended set points to achieve an 11 percent reduction in MBTUs while gross square footage has increased by 18 percent.

Due to drought mandates that were established by the State of Georgia in 2007, UWG reduced water consumption by 18.1 percent in FY08 and an additional 3 percent in FY09. Student enrollment increased by 10.7 percent during this same period.

With the price per gallon of gasoline eclipsing \$4 in the summer of FY08, CP&F established a Six-Sigma effort for their work and purchasing processes that resulted in a 10.5 percent reduction in gasoline fuel consumption, a 14.7 percent reduction in diesel fuel consumption, and a \$17,525 overall savings in fuel purchased in comparison to the previous fiscal year.

For the first time since its inception, Risk Management completed comprehensive property inspections in all 84 buildings on campus within the same fiscal year. The information has provided facilities personnel with confirmation of work that has been completed and an objective viewpoint of work that has to be done.

The CP&F staff completed two major building projects exceeding 152,000 square feet within budget and ahead of schedule in FY09. Two additional projects—the Greek Village (88,098 sq. ft.) and the Athletic Complex (244 acres)—have just been completed.

Facing a reduction in state revenues in FY09, CP&F implemented austere methods to assist UWG in meeting mandated budget reductions. With the brunt of the reductions coming from the freezing/elimination of personnel positions, CP&F had to develop new methods and approaches to getting the work done without compromising services or employee morale.

Using established feedback methods such as the Organizational Trust Survey, departmental customer satisfaction surveys, and work order surveys, FY09 measurements reflected a very satisfied customer base as well as content employees.

While Mr. Renfrow is pleased with CP&F's efforts and achieving this distinguished award, he still believes there is room for improvement. "I believe in our people, and we have the capability to improve and build on our current strengths." He also encourages other institutions to consider undertaking the AFE assessment. "So many institutions go to great lengths to find competition to benchmark against when the best benchmark for comparison is within your own organization. APPA's AFE will provide your organization with a self examination of your leadership, strategic planning, customer focus, information analysis, human resource efforts, process management, and business results."

CP&F remains committed to providing the students, faculty, and staff of UWG with the highest levels of service in order to maintain the stewardship of the university's facilities. Mr. Renfrow notes, "While we are honored to have been selected for the 2009 APPA AFE, we remain cognizant that the key to our success is a dedicated, loyal, and motivated staff that takes pride in their accomplishments and the successful delivery of the institution's mission – *Educational Excellence in a Personal Environment.*"

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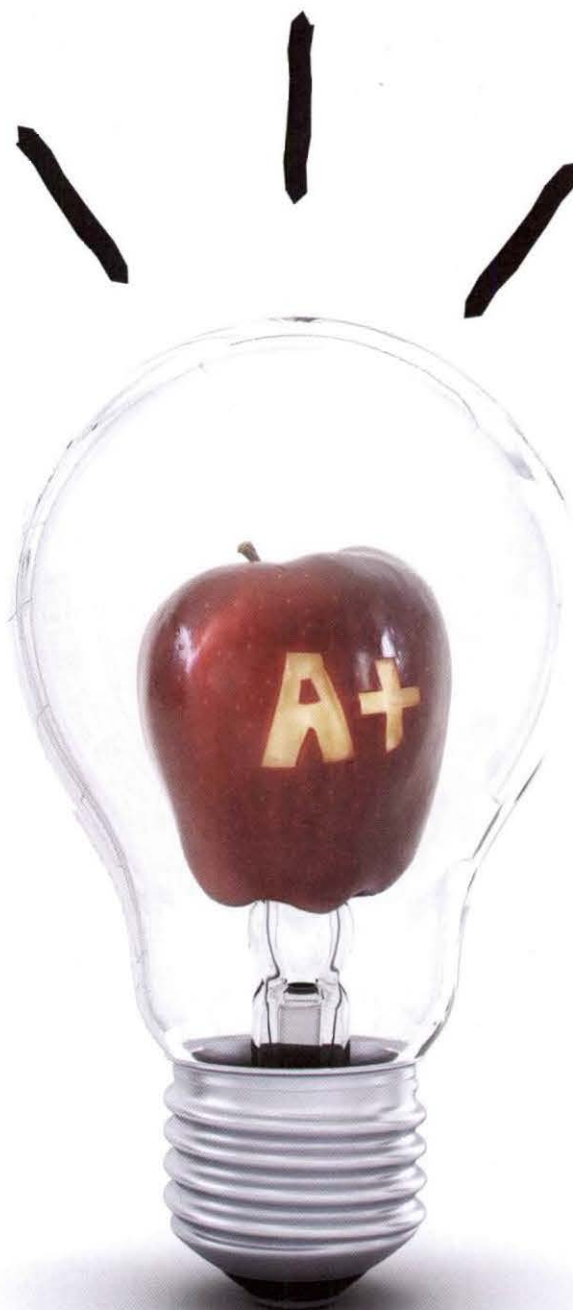
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# Creativity Marks the **2009** Effective & Innovative Practices Award Winners



**A**PPA's Effective & Innovative Practices Award continues to highlight an ever-growing list of creative and practical programs and processes that enhance and transform service delivery, lower costs, increase productivity, improve customer service, generate revenue, or otherwise benefit an educational institution. The five 2009 award-winning entries focus on small renovation projects; employee recognition; utilities distribution systems; safety training; and capital asset documentation.

Up to five Effective & Innovative Practices Award submissions are eligible each year for a cash award of \$4,000, which is generously sponsored by Sodexo Campus Services. Entries are judged by APPA's Professional Affairs Committee and are based on 1) institutional benefit; 2) innovation and creativity; 3) portability and sustainability; 4) management commitment and employee involvement; and 5) documentation, analysis, customer input, and benchmarking.

The five successful schools received special recognition and a check at the APPA 2009: Focusing on the Critical Few conference in Vancouver in July. The awards were presented by Craig Bell of Sodexo and APPA's Bill Elvey and Kevin Folsom.

To view the complete applications and summaries from previous award winners, or to learn how to submit an entry for the 2010 awards, please visit [www.appa.org/recognition/effectiveandinnovativepractices.cfm](http://www.appa.org/recognition/effectiveandinnovativepractices.cfm).



# University of North Texas

## REVISED SMALL RENOVATION DELIVERY PROCESS

BY CHARLES A. JACKSON

*Charlie Jackson is executive director of facilities at the University of North Texas, Denton, TX; he can be reached at charles.jackson@unt.edu. This is his first article for Facilities Manager.*

**T**he University of North Texas Facilities Department revised the small renovation project delivery process in response to widespread customer and employee dissatisfaction. After a "peer review" of the many different methods used by other institutions for project delivery, the revelation came to us that *if we wanted to be compared to a contractor, we needed to act as if we were a contractor.*

We then created a new project delivery methodology with guaranteed "contract pricing" prepared from RS Means' average pricing. Estimates using average pricing could usually be completed from the plans without time-consuming site surveys.

The result has been consistent pricing for similar remodels whether constructed by in-house personnel or outsourced construction firms. The guaranteed pricing has been especially well received by the customers. This method of delivery provides productivity incentives for the in-house construction team to work efficiently as if they were a small contractor.

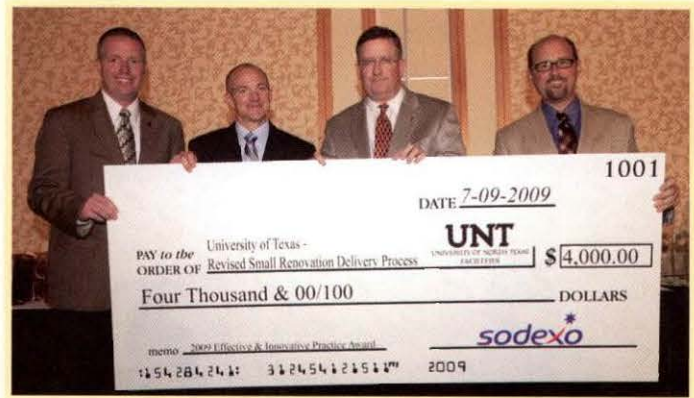
### INNOVATION/ CREATIVITY/ ORIGINALITY

Small renovation projects were usually in trouble from the very start, as there was never sufficient time to prepare a detailed estimate. In an attempt to expedite the estimating process, contractors would be brought in. Their subsequent initial estimate generally exceeded the budget, and this would then precipitate scope reductions or cost overruns.

In addition to the estimating challenges, projects previously were billed to the customer through a combination of work orders and purchase orders. Final billing could not be completed until the last work order was closed and the final vendor invoice had been paid. This resulted in a stream of charges that aggravated the customer's financial staff as well as the Facilities Business Office.

Everyone was dissatisfied with the process. As a result, three major changes were made to the procedure:

1. Estimates are prepared using average unit pricing.
2. These estimates are then guaranteed and invoiced as a "fixed price."
3. Finally, billing was changed so that the customer is only



billed twice; 50 percent when the notice-to-proceed is issued and 50 percent upon occupancy.

This procedural change meant that Facilities was operating with the same set of "best practices" used in businesses. Funds are collected in a revolving account.

### INSTITUTIONAL BENEFITS

The value of consistent estimates is obvious. Customers with similar remodels were now paying the same charges whether the project was completed in-house, by contract, or by a mix of the two. Customers were thrilled to know that they were able to receive their project for an agreed upon price that would change only if they requested additional services.

Costs incurred throughout the project were collected and reimbursed to the project fund account only after the client was satisfied. The final billing included any authorized changes to the scope and the administrative charges. By reducing the number of charges impacting client accounts and working from a signed and approved project budget, reconciliation of expenditures was improved, client expectations were better managed, and budgetary accounting was simplified.

Lastly, the benefits recognized by Facilities operating as a business enterprise cannot be overstated. Customers are impressed when estimates are calculated with a fixed price per square foot or square yard and then guaranteed. Our staff feels as if they were competing against a standard. The bar of professionalism is raised.

### PORTABILITY AND SUSTAINABILITY

In our survey, we found that small project delivery procedures varied widely. Some schools charged materials but not time. Some institutions included overhead in their time calculations while others did not. Still, everyone was burdened by final cost not matching the estimate for all the same reasons. Estimating using an average cost and then guaranteeing the estimate would solve this problem no matter what methodology is used for developing the hourly rates at the institution.

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The only ingredient necessary is management commitment to the process, because while Means or average estimating provides a good starting point, developing accurate average rates means that some projects come in slightly over budget and thus “lose” while others make money. It takes a several month commitment to demonstrate that this will work out.

The reality is that in our experience that the University of North Texas never “lost” money but only made less recovery on some projects than we did on others.

#### MANAGEMENT COMMITMENT AND EMPLOYEE INVOLVEMENT

When average pricing is used, everyone involved needs to remember that “average” is just that. If \$2.65 per square foot is used as the price for new ceiling construction, then it should be remembered that this average will work out over the course of a year; panic on the first job where the ceiling costs \$3.00 per square foot because of an unforeseen problem will cause the program to fail. In that respect, the University of North Texas administration allowed this initiative to succeed by supporting it long enough for all involved to have confidence in the plan.

The construction employees grew to appreciate the new process because they now had a benchmark and standards. The estimators were glad to be relieved of the perceived pressure to foresee every contingency. The Budget Office and the Facilities Business Office enjoyed the simplicity.

#### PROGRAM ANALYSIS AND DOCUMENTATION

This program will be successful when the average unit costs are realistic, as this approach provides value for the customer and incentives for the Facilities organization. Indeed, either excess revenues or unrecovered costs will lead to “business” or program failure, just as it would with the contractor.

The University of North Texas successfully used this methodology to “fast track” 45 remodel and renovation projects with an estimated value of \$6 million prior to the start of classes in the fall of 2008. The final costs on nearly all of these projects were very close to the original estimate.

There will be administrative problems with this model if it cannot be demonstrated conclusively that in the long run the construction and remodel operations are “nonprofit” and at “zero sum.” State facilities organizations cannot legally subsidize auxiliary operations nor will Office of Management and Budget A21 guidelines tolerate excess revenues. A long-term balance sheet needs to be created and the unit costs need to be monitored and readjusted as required.

This new practice accelerates service delivery, lowers costs, increases productivity, improves customer service, and generates revenue.



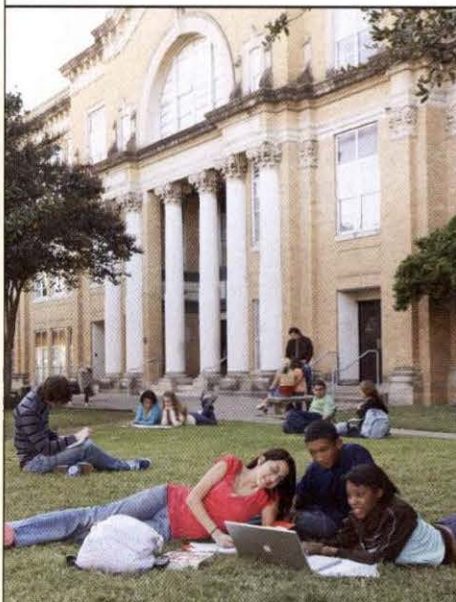
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# University of Texas at Austin

## EMPLOYEE RECOGNITION SITES AWARD

BY LAURIE D. LENTZ

Laurie Lentz is communications coordinator for facilities services at the University of Texas at Austin; e-mail her at [laurie.lentz@austin.utexas.edu](mailto:laurie.lentz@austin.utexas.edu). This is her first article for Facilities Manager.

While educational institutions face challenging financial times, one initiative that can improve morale and help employee retention without incurring big expenses is an employee recognition program.

The University of Texas at Austin (UT) is one of the largest public universities, with approximately 50,000 students and 21,000 faculty and staff. Facilities Services maintains 18.6 million gross square feet and supports 439 buildings encompassing 901 acres of campus grounds in the heart of Austin, Texas. Working with our sister department, Project Management and Construction Services (PMCS), we support our campus community with a combined workforce of 1,039 employees.

One of our strategic goals is to have a highly motivated, well-trained, stable workforce. To achieve this, we have implemented two employee recognition programs:

**Employee Recognition SITES award** and **"On-the-Spot" Award**. Both are endorsed by university management and are highly regarded honors throughout the departments.

### EMPLOYEE RECOGNITION SITES AWARD

The SITES award identifies employees who demonstrate exemplary performance above and beyond regular job functions, exhibiting the core values of Facilities Services and PMCS: Service, Integrity, Teamwork, Excellence, and Stewardship. These are the award criteria:

- **Service** - consistently focuses on unconditional efforts to best serve our customers
- **Integrity** - consistently earns the trust of others through professional conduct that includes honesty, reliability, and competency
- **Teamwork** - consistently works together cooperatively in support of our mission. We value each individual and their contributions to the team and treat each other with respect and dignity
- **Excellence** - consistently and enthusiastically delivers quality services to our customers while consistently seeking to improve those services through creativity and innovation
- **Stewardship** - consistently conducts business in an environ-



mentally, socially, and economically responsible manner that is reflective and protective of the public trust placed in us as stewards of the university's facility-related resources. SITES has gained momentum since its 2006 beginning. We've received 204 nominations, representing 19.6 percent of the Facilities Services and PMCS workforce. Thirty employees have received this award.

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### How an employee is nominated

The nominator completes the Employee Recognition Nomination Form available online or in print and sub-

mits the nomination to the Employee Recognition Committee chairperson or Facilities Services/PMCS Director's Office.

### Who can be nominated?

Nominees must be employed by one of the departments for at least one year before being nominated. The award is not open to directors, associate/assistant directors, previous year recipients, groups, crews, or current members of the Employee Recognition Committee.

### Helping employees nominate peers

To address concerns that only those who could write well would be able to nominate a winner, working sessions were set up in 2008 to help employees put their thoughts into words on the nomination form. The number of applications submitted surged, up 79 percent from the previous year.

During the nomination month, employees are told about the program through e-mails, staff meetings, and informational posters.

### How winners are selected

The Employee Recognition Committee is made up of the past year's recipients, as well as delegates from the directors' offices of Facilities Services and PMCS. This committee



1. Reviews all nomination forms
2. Creates a selection matrix
3. Forwards names of finalist(s) (no more than ten) to the assistant director of Administrative and Personnel Services and the directors of Facilities Services and PMCS, who ensure that the nominee is eligible and the documented service or activity reflects exemplary performance for recognition.

#### *What's awarded?*

- Recognition activity with shop or office employees
- Certificate of recognition
- \$500
- 8 hours paid time off
- Recognition group photo plaque, on public display in main lobby
- Recognition on the PMCS and Facilities Services websites
- Personal gift
- SITES award pin

#### **ON-THE-SPOT RECOGNITION PROGRAM**

Facilities Services and PMCS employees can be honored for their exceptional workplace efforts "on the spot" by their supervi-

sor, manager, or director with an "On-the-Spot" card. Recipients claim one of five gifts and receive eight hours of leave with pay.

#### *Giving and redeeming the award*

1. The supervisor, manager, or director notes the employee's exemplary action on the card, signs it, and gives it to the employee.
2. The employee selects one of five recognition items listed on the tear-off section of the card. He or she takes that section to Central Stores (our distribution center for parts and supplies) to obtain the selected item.
3. Central Stores retains the tear-off section for tracking purposes. Employees are encouraged to send a copy of the remainder of the card to Personnel for their employee file.

#### *What's awarded?*

Employees have a choice of

- Dominos
- Flash drive
- UT folding chair
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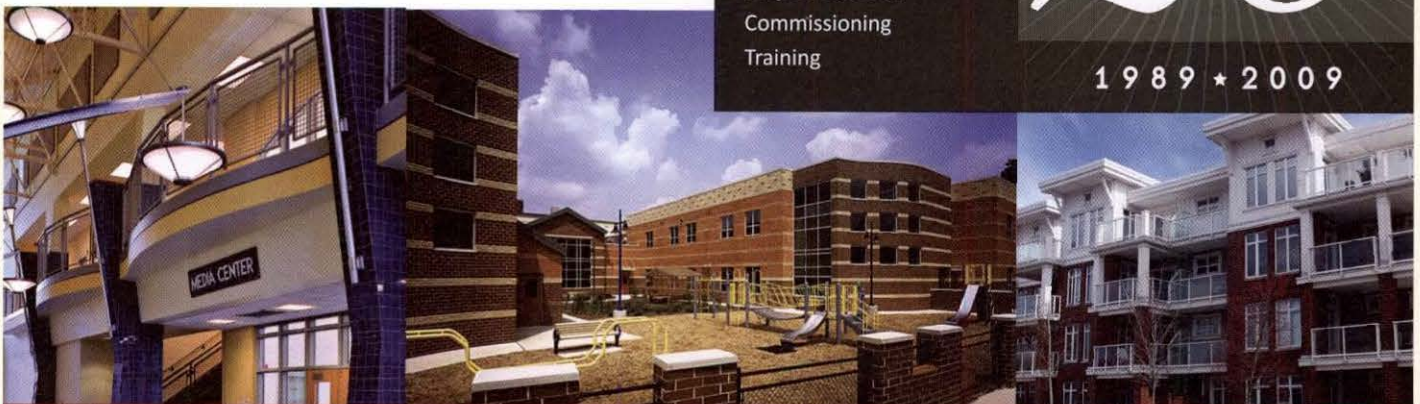
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#### INSTITUTIONAL BENEFIT FOR RECOGNITION PROGRAMS

SITES heralds a group of hardworking employees selected based on input from peers. Of the 30 SITES winners, only one employee no longer works for the university.

#### PORTABILITY

These recognition programs could be easily adopted by other institutions. Procedures are adaptable, and we willingly share lessons learned along the way.

#### MANAGEMENT COMMITMENT AND EMPLOYEE INVOLVEMENT

The vice president of university operations endorses both recognition programs. Winners are applauded for their efforts to make UT a first-class institution.

#### DOCUMENTATION, ANALYSIS, CUSTOMER INPUT, AND BENCHMARKING

- **SITES:** A copy of the award letter or certificate is filed in each nominee's personnel file. The directors of Facilities Services and PMCS send a congratulation letter to nominees.

An e-mail listing the winners is sent to employees of Facilities Services and PMCS.

A standard operating procedure ensures consistency year to year. At the conclusion of each year's awards, the selection committee meets to discuss lessons learned.

SITES was modeled after the University Operations SLICE award (Service, Leadership, Innovation, Creativity, and Excellence), which is our benchmark.

- **On-the-Spot Program:** The "On-the-Spot" card is tracked through Central Stores, where the employee redeems his or her prize. The employee can have a copy of the card included in his or her personnel file.

We plan to benchmark other educational institutions to see what recognition programs they have developed and explore any lessons learned.

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# Valparaiso University

## NATURAL GAS & MEDIUM VOLTAGE DISTRIBUTION SYSTEM

BY FREDERICK W. PLANT

*Fred Plant is executive director of physical plant at Valparaiso University, Valparaiso, IN; e-mail him at fred.plant@valpo.edu.*

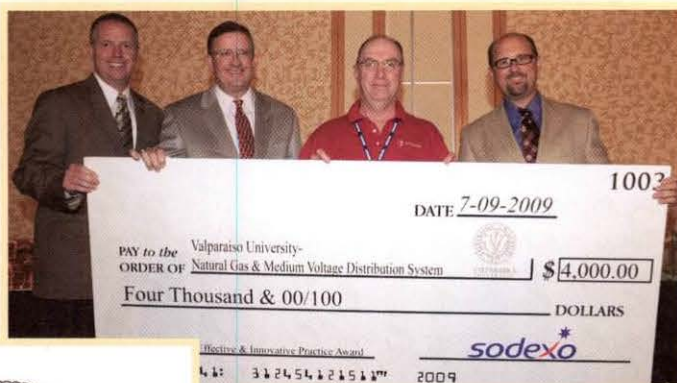
**T**his project involved the negotiation of a contract with our local utility company that caused that company to replace the university's substation, natural gas and medium voltage (12,500) distribution systems throughout the campus.

### INSTITUTIONAL BENEFIT

The benefits to the utility company were an increased revenue base because the rates moved to the utility's regulated rate structure. Secondly, during the 36 months of financial recovery the university agreed to purchase commodities from the utility company. The utility company was granted a site for the substation on the university



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property, which saved the utility company a prolonged acquisition process. This substation serves not only the university but other customers in this area of the city.

A principal benefit to the university was avoiding the backlog of deferred maintenance related to these two systems. This project also transferred the maintenance of these two systems to the utility company for the university. Every building is metered for natural gas and electric with the university having access to these electronic meters for

our own data collection. By separately metering each building the university no longer spends time attempting to manage power factor correction nor demand since most of our buildings are small enough not to consume power at these levels.

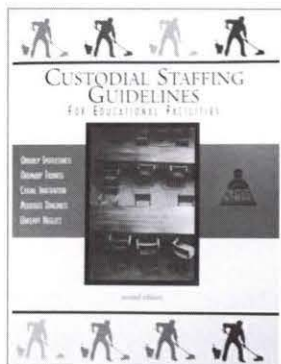
The first byproduct is the ability to reallocate our labor and maintenance budget. Additionally this eliminated many of our confined space issues because the electric manholes were all eliminated. The university no longer pays for electric line losses from the substation to the campus buildings. The internal accounting for these two utilities is greatly simplified because the buildings are individually metered.

The design of the system also created two feeds to the campus from opposite directions and substations, providing redundancy.

### INNOVATIVE, CREATIVE, AND ORIGINAL

The university's leadership, including its Board of Directors, were supportive of this project. In their view a large deferred maintenance obligation was eliminated; there was a great increase in the capacity of these two systems; and the operating budget in

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terms of maintenance and labor were able to be reallocated to offset other budget pressures.

The process of working through the contract documents, easements, real estate lease for the substation, rights of way took many months. This include leadership and legal counsel from the utility, university, and city were all involved in organizing the paths necessary to allow this to occur.

Our Facilities Management Department staff was involved during the one-year planning process, which involved data collection, logistics planning, and the development of paths and sequences. The construction process was confined to six months, which required our staff to mark old lines in advance of construction, coordinate outages/startups, minimize startup loads, verify when equipment came back online, light pilots, make sure meters were sending pulse, clean natural gas filters until lines were purged, and then organize the site restoration.

#### SOME OF THE OUTCOMES

- 2001 Total Purchase Energy was 171,338 MMBTU....by 2007 it was 163,777 MMBTU even though over 100,000 s.f. had been added

- 2001 Total Fossil Fuel purchased was 118,001 MMBTU...by 2007 it was 114,984 MMBTU
- 2001 Total Electric purchased was 53,337 MMBTU...by 2007 it was 48,793 MMBTU

As the natural gas and electrical system project was underway, plans for a second phase were developed. This second phase began within a few weeks of the completion of the natural gas and electrical system project.

This increased the natural gas and electric capacity to levels that would allow the campus to increase its square footage, which has occurred by approximately 12 percent. In addition to this project the university also replaced its domestic water distribution system and constructed a voice/data ductbank.

Having this increased natural capacity provided the opportunity to install high efficiency boilers in buildings served by a central boiler house. This allowed this central boiler house, functioning at 80 percent efficiency, to be retired. This resulted in retiring the high temperature hot water system as well. The university budget was advantaged by a decrease in energy loss from the distribution system, elimination of associated water softening, water treatment chemicals, assorted pumps and motors, and a good deal of labor.

## Weber State University

### SAFETY TRAINING BOARD GAME

BY SHAWNA ROWLEY

*Shawna Rowley is finance and human resources manager for Weber State University, Ogden, UT. She can be reached at srowley@weber.edu. This is her first article for Facilities Manager.*

Every institution requires its employees to attend safety training. No one would argue that it is necessary, important, and beneficial. But when employees are told that it's their turn to attend, more often than not, the reaction is accompanied by a groan. Most of our employees told us that safety training was boring, that it was hard to sit and listen to someone lecture on one topic for hours at a time. This is especially true considering the fact that most facilities employees are used to being out and about and on their feet and not sitting in an office.

Based on feedback we received on previous training sessions, we set a goal to develop an approach to safety training that would be both educational and fun. We wanted to create something that would have our employees asking when it was their chance to go to safety training, rather than dreading their turn.



## WEBER STATE UNIVERSITY

To accomplish this goal, we developed a training approach based on a popular board game. Participants would be placed into four groups and the groups would compete against each other. We had hoped that the competition factor would increase participation. Our expectations were exceeded beyond belief. The training was wildly successful!

#### HIGHLIGHTS

The game board was personalized to our institution and reflected our campus in a positive light. It gave the participants something they could easily relate to and identify with. Our mascot served as the starting point and our most recognizable landmark (the bell tower) served as the finishing point. The spaces on the game board



were in our school colors: purple and white. Although we used the board during safety training, the nice thing about it is its flexibility. The game board can be adapted and used during any type of training session.

All participants were exposed to a wide variety of safety topics. These topics ranged from lockout/tagout to properly storing cleaning chemicals. It was designed to give all employees a broad overview of the important safety topics facing the facilities industry as a whole.

Our workers compensation insurance representative attended all of our sessions and spoke for about 15 minutes on the topic of reducing workers compensation claims. He also took questions from the audience. This allowed us to have an expert present at the meeting but limited the amount of lecture time. Then, we spent about an hour playing the interactive game.

The rules of the game were simple. Participants were divided into four groups and each group elected a spokesperson. During their turn, each group was given a randomly chosen question. As a group, they could discuss the question among themselves and come up with an answer. The spokesperson would then shout out the answer. If they were right, their game piece would be moved the corresponding number of points. If they were wrong, another team could try and steal the points. This required that

all teams pay attention to all questions (and as a result, be exposed to all the question topics). When it was all said and done, what the winning team won was bragging rights. Everyone who played received a first aid kit as a prize. We were all winners because we were all learning.

#### HOW OTHERS CAN ADAPT THIS IDEA

This concept is an easy one to adapt for any business. We happened to have access to an artist who could draw our game board but one could also use an aerial photo, a map, or clip art. And if someone were to take the time to create a personalized game board like we did, then it's nice to know that the game board can be used for an endless number of situations. Institutions of higher education are fortunate because we generally have access to many art students who would welcome the opportunity to make a little bit of money drawing cartoons. It's inexpensive to create, yet makes an amazing impact. Every time we revealed the game board, people made comments about how cool it was and many asked if they could have a copy of it.

The game can be used with any number of people. We've used it with groups as small as 12 and as large as 85. No matter the size of the group, we just took the total number of people and divided them into four teams.

Other similar ideas include using a poster of a race track or road and "racing" Hot Wheels cars around it. Or, you could get a picture of a football field and move people in one-yard increments. Really, the possibilities are only limited by one's imagination. We love the idea of someone looking at our game board representing Weber State and then coming up with their own way of adapting the idea to their location. The possibilities are really endless.

#### COMMENTS

Kevin Hansen (Associate Vice President for Facilities and Campus Planning):

*"Safety training is necessary, valuable, and most often boring. The dry lecture or outdated safety film that numbs the mind and does not stimulate interaction or thinking on the part of the trainee is the norm. Such is not the case at Weber State University. Shawna Rowley found a way to make safety training fun, interactive, competitive, and collaborative. Her safety game got people talking, laughing, thinking, and collaborating in a fun, non-threatening competitive environment so*

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*everyone was engaged. The safety questions to be answered covered every craft and circumstance, so all were benefited by every answer, and all who attended came away enlightened. And did I say it was fun! Shawna followed one of the management philosophies we espouse at Weber State Facilities Management, best captured in a quote from General George S. Patton: 'Never tell people how to do things, tell them what to do and they will surprise you with their ingenuity.' As the executive over Facilities Management, Shawna captured everything I am encouraging in every employee. She then took it to a much higher level."*

## EMPLOYEE COMMENTS

Employees were generally receptive of the idea for this training. We've hosted three of these safety-related training sessions so far. We have approximately 250 employees in Facilities Management at Weber State and about 180 of them attended one of those three sessions. Since the last session, I've had countless people ask me when I'm going to schedule another session. People who weren't able to attend one of those sessions have heard others talking about it and are wondering when they'll get a chance to play!

As I stood by the door during each session, handing out first aid kits and thanking people for attending, I heard many

positive comments from the participants. One person even left a voice message for me during the time it took me to get from the training session to my office. He said he enjoyed the "very, very good" meeting and just wanted to thank me for hosting it. Other comments I received are listed below:

"I have to be honest; I went to the meeting last Friday with a bad attitude – all the usual stuff about more things to do than time to do them. The meeting proved worthwhile, however, and I appreciate your efforts in putting it together and carrying it off (and for turning my attitude around.)"

"I thought the game was fun, it was a good way to cover lots of safety rules that we tend to just take for granted, and may even forget. All of us need to be reminded on a regular basis."

"I learned some new things and I'll admit that's rare for me."

"Everyone in my area reported that it was one of the better safety meetings because the speaker was brief and hit on important areas. The game was fun and a good thing instead of one speaker talking for the entire time."

"You guys kept it light and free flowing. I had a good time."

"I liked the training. It was a good and fun reminder."

"The game was a fun way to go over safety rules."

"It's always good to keep safety as a reminder. I liked your class participation game."

# Western Michigan University

## IN-HOUSE CAPITAL ASSET DOCUMENTATION PROGRAM WITH GIS BY DANIEL LIST

*Dan List is the GIS manager, facilities management, for Western Michigan University, Kalamazoo, MI; e-mail him at [daniel.list@wmich.edu](mailto:daniel.list@wmich.edu). This is his first article for Facilities Manager.*

**T**he Department of Facilities Management at Western Michigan University is responsible for operating and maintaining the physical environment of the university community. This includes 151 buildings with 8,814,880 sq. ft. of building space, over 1,200 acres of grounds, 23 miles of roadways, 39 miles of walkways, and over 120 miles of utilities.

## THE PROBLEM

In the mid 1990s details about the campus utility systems and landscape infrastructure existed primarily on old

faded drawings and in the minds of a few seasoned employees. By engaging students from the Department of Geography and College of Engineering and Applied Sciences to undertake a Geographic Information System (GIS) Initiative, WMU was able to document their infrastructure in a digital map format. It is also important to note that this was done in a time of limited funding and without sacrificing other Facilities Management initiatives.

## THE SOLUTION

Initially, GIS and GPS technology were combined to record the position of all utility assets such as vaults, manholes, and shutoff valves. In addition to assisting with requests for utility locations, the location data enabled WMU to significantly reduce the staff time involved in filling location related requests. For instance, in a region accustomed to over 60 inches of snow per season, Landscape Services began using the data to create and continually update their snow removal plan. A tree inventory project was also completed, which established the GPS location of over 5,000 trees along with their species and other physical attributes.





Students were hired based on their technical GIS expertise. Once projects objective were established, the students were responsible for designing, completing, and integrating them. Electing not to hire outside contractors saved the university thousands of dollars upfront, and the project management opportunities offered to students has greatly enhanced their educational experience.

One of the goals of the GIS Initiative was to make the data available to staff and other university users through a user-friendly, interactive Web application. Initially, the upkeep of the site was handled internally by Network Services staff. The website has both a public and a secure access application that can be accessed from [www.fm.wmich.edu/gis](http://www.fm.wmich.edu/gis). With minimal training, staff members are able to use the site to view the location of features and associated information about size, type, and condition. Examples of information linked to this site include videos of the sanitary sewer condition and thermal imaging reports of the steam distribution system. The website is completely customizable and expandable.

In 2008 the decision was made to hire a professional GIS Manager. This was done to provide consistency in supervision, continuity in program goals, and increased technical expertise to expand the program. A new full-time position was created by merging vacancies gained through retirements and attrition at a time when the entire State of Michigan and WMU were battling funding shortfalls. The GIS Manager is responsible for the oversight of GIS data collection, data management and security, and data accessibility. The manager would also be principally responsible for maintaining the GIS website and continuously looking for ways to improve it, thus reducing the load that was put on the limited Network Services staff. Even with a GIS Manager on staff, there continues to be a commitment and focus to involving student staffing.

GIS is used frequently in the "Miss Utility" locator program, of which WMU is a participant. When dig requests are made, a map of the potentially affected utilities is generated by support staff at the Facilities Management Service Center. The appropriate utility manager is then responsible for locating the utility. If the manager finds discrepancies between the map and what is located, then he or she communicates the issue to the GIS staff for correction.

The detailed information gathered by the GIS Initiative will make it possible in the future to go about asset management in an organized and quantifiable fashion. Currently,


WMU is using GIS to assist in researching the replacement costs of existing systems. Also, the expandability of the system enables WMU to gather increasing amounts of data that facilitates future analysis and more informed decisions.

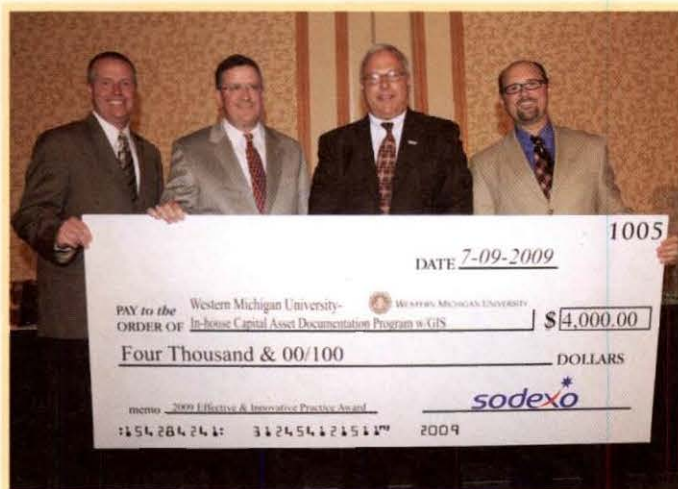
The data has survived several changes in software, hardware, and direction, and has enabled the campus utility managers to identify and track the condition of the utility systems in order to prioritize line repairs and replacements, with the goal of fixing them before they fail.

### PROGRAM ANALYSIS

Knowing the precise location of all the aspects of the physical environment has proved to be valuable in planning, executing, and analyzing projects on campus. Given the informal way WMU went about the development of the GIS Initiative, it is difficult to ascertain the program's specific cost to implement. Our best estimates put the cost from \$50,000 to \$60,000 through 2007. Most of this was spent on part-time student wages, staff supervision time, and contracted services. The GIS Initiative used technology and students to transform existing information from a fragile hard-copy state where it was difficult to find key information, into a specifically organized and secure system.

Cooperation between municipal and county government agencies has also greatly enhanced the GIS. In recent years, reliance on data capture has shifted more towards the use of aerial photography rather than GPS due to the availability of high-resolution photography through local partnerships.

The GIS Initiative combines the mission of the university to educate students with the demand on Facilities Management to deliver services. In this, the students themselves have been essential to creating a system that effectively expands their educational achievements and improves the operational success of WMU. 







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Photos by Rhonda Hole

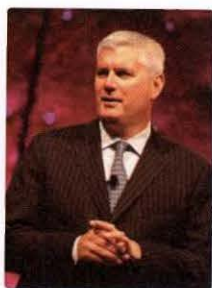


## « Keynotes

- Economic Recovery Panel
- » • Stephen R. Covey
- » • Michael Abrashoff
- » • Chip and Dan Heath



Covey



Abrashoff



Chip Heath



Dan Heath

## 2009-10 APPA Board of Directors »



## Meritorious Service Award »

- Robert J. Carter
- Robert S. Hascall
- Theodore Weidner



Carter



Hascall



Weidner



## Outgoing Senior Regional Reps to the Board »

- CAPP - Dave Millay
- ERAPP - Willy Suter
- MAPPA - Jerry Carlson
- PCAPP - Buzz Nelson
- RMA - Eakle Barfield
- SRAPP - Marion Bracy (Not pictured)

## Outgoing Elected Officers »

- B. Kevin Folsom - Professional Affairs & Awards/Recognition (second from left)



## APPA Fellow Award »

- Alan Bigger



## « Award for Excellence

- Philadelphia University
- University of North Florida
- University of West Georgia



## President's Award

- Spencer Hall (Not pictured)

## Unsung Hero Award »

- David Gray
- (Not pictured)
- Kris Ackerbauer
- Terry Pellerin
- Shari Philpott
- Phil Rouble



## « Pacesetter Award

- Ruthann Manlet
- David Millay
- John Wong
- Scott Burns (Not pictured)



## Recognition of APPA Sponsors

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- Spirotherm, Inc.
- UGL UNICCO



### « Gold Award

- TMA Systems, Inc.
- EATON Corporation (Not pictured)

### Silver Award »

- Honeywell, Inc.
- Western Construction Group (Not pictured)



### « Bronze Award

- AssetWorks, Inc.
- M2Consulting (Not pictured)
- Centennial Contractors Inc.
- Sebesta Blomberg
- Tero Consulting
- Woolpert



## CFaR Researcher Award »

- Maggie Kinnaman



## CFaR Student Research Project Awards

- Brigham Young University Students and Advisor Jeff Campbell



## « Rising Star Award

- Allen Quigley – Clarion Safety Systems



## Eagle Award »

- Bill Johnson – Haley & Aldrich



## Rex Dillow Award »

- Fred Gratto, University of Florida, "Give Me Liberty or Give Me Brick"



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# Sustainability Dashboards Provide Roadmap to Success

By Jim Simpson

I love looking at classic cars in parades. From Model Ts to 57 Chevys, they're a great flash from the past. Best of all are the dashboards. At a glance, you can see how much gas you have left, how fast you're going, and if the engine is running hot.

As much as I love the old chrome dials, to be honest, I've gotten used to looking at the information you can find in today's cars. I really like to know my mileage per gallon, what direction I'm headed, and - with hybrids - how my energy is being used. It's a little more complex, but it makes me a better driver.

It's similar to new software for campuses with many buildings. A Sustainability Dashboard provides a graphic look at real-time data from across the enterprise. It's a single interoperable platform that can communicate with

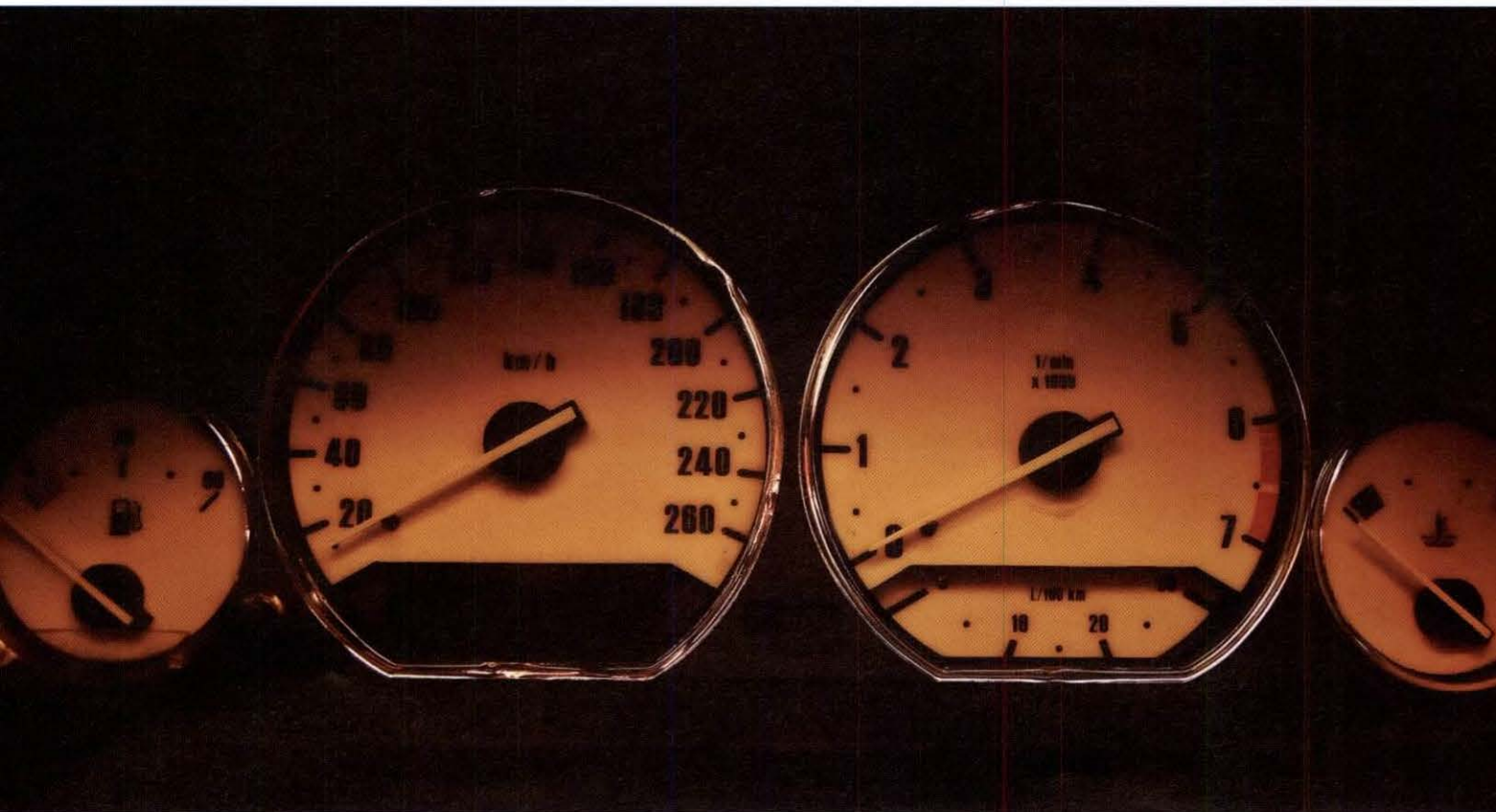
**A SUSTAINABILITY DASHBOARD PROVIDES A GRAPHIC LOOK AT REAL-TIME DATA FROM ACROSS THE ENTERPRISE.**

existing control systems, normalize the data, encrypt it, and integrate that data securely with enterprise applications and suppliers - for both financial and environmental reasons.

## TOTAL COST OF OWNERSHIP

This type of dashboard provides visibility to the total cost of ownership for operations, maintenance, energy, and capital sources across an entire real estate portfolio and the business processes that support it. The system enables accountability through real-time smart decisions that use data to dramatically increase efficiency and reduce operating costs across the entire enterprise.

That means organizations can manage energy and water, improve operations and inventory, diagnose downtime and maintenance, and report on capital investment - and track results in terms of greenhouse gas (GHG) emissions.





For instance, the State of Missouri developed an enterprise sustainability manager across its 32 million sq. ft. of space and thousands of buildings. After facility audits, the team integrated existing and new systems to build a complete, Web-enabled, building information management system, including a portal interface that delivers operations, maintenance, energy, and capital data to the state's facilities department in real time.

The result is a more efficient and effective state facilities department and annual energy and operational savings of \$9.5 million. In addition, the state is using the data to calculate its carbon footprint and determine how to best reduce emissions. Information is normalized across the portfolio to reflect usage, costs and GHG, by square footage, number of people that occupy a facility, and degree heating or cooling days.

#### CONSIDERING THE INVESTMENT

The concept of a sustainability dashboard is terrific, especially when there are multiple systems and buildings within a campus. But it's not for everybody. Here are some things to think about when you're considering the investment:

- *Are you responsible for a building portfolio exceeding 1 million sq. ft.?*  
Dashboards are most effective when you can take volume into account.
- *Is your institution data-driven? Do you need to measure your campus's performance to meet government mandates, benchmark facilities to meet ENERGY STAR® or LEED® ratings, or provide voluntary reporting such as the American College & University Presidents Climate Commitment or Mayors Climate Protection Agreement?*  
Dashboards can provide all this information.
- *Do you have a strong IT team?*  
Although integrating data can be challenging, a robust interoperability layer helps you extend the value of your legacy systems. Be sure

**THE COLOR CODING AND METRICS ON A SUSTAINABILITY DASHBOARD REPRESENT DATA IN SUCH A WAY THAT AN END USER IS NOT BOGGED DOWN BY INFORMATION OVERLOAD BUT INSTEAD IS ABLE TO DECIPHER VERY QUICKLY AREAS WHERE ADDITIONAL ATTENTION IS REQUIRED.**

the dashboard you choose can talk with TCPIP, Web Services, SOAP, and XML in order to both take the information in and report the information out.


And perhaps the toughest question of all — *Are you ready for this?* Because a Sustainability Dashboard transparently reports data — LOTS of data — it means the college or university and its leaders need to be committed to:

- **Using the data in a meaningful way.**  
For instance, a dashboard can provide actionable information to reduce energy waste on average of 20 percent annually, representing 25 to 55 cents per square foot. The organization needs to be ready to move forward and reduce energy, perhaps through a performance contract.
- **Demonstrating the value each part delivers to the whole.**  
The detail of a dashboard will make it very clear which areas are performing — and which could do better. That also means having a team that will be accountable for continuous improvement and to some degree, encouraging competition to develop best practices.
- **Being innovative and entrepreneurial, rather than bureaucratic.**  
When it comes to finding ways to reduce greenhouse gas emissions without spending capital funds, facilities teams have to consider new technologies, approaches and partnerships that all can make best use of the dashboard data.

#### COMMUNICATION IS KEY

The key to success is communication. Business guru John Naisbitt says, "We are drowning in information but starved for knowledge." The color coding and metrics on a sustainability dashboard represent data in such a way that an end user is not bogged down by information overload but instead is able to decipher very quickly areas where additional attention is required.

It takes a true leader to not only have the information, but also use it to enact change. For example, at the University of North Carolina — Chapel Hill, a Web-based enterprise building management systems is allowing the traditional BAS to move from a proprietary and private world, little understood by the building occupants, to a system that everyone can actively use to enhance their use of the space they occupy.

Just as we've moved from country lanes to the interstate, having a strong dashboard will help large-scale organizations move from a building-specific approach to an enterprise approach that will benefit all. 

Jim Simpson heads up the sustainability and energy efficiency business in the higher education and state government markets for Johnson Controls in Glendale, WI. He can be reached at [james.m.simpson@jci.com](mailto:james.m.simpson@jci.com). This is his first article for *Facilities Manager*.





# How Codes Become Law

By Richard J. Davis, P.E., J.D.

**T**his article explains how codes written by private corporations become law, and discusses some aspects in the operation of building codes.

Several building and safety codes that affect construction and renovation are adopted by states and local governments. For example a state legislature might adopt the International Building Code by enacting a statute, making the IBC of a certain year applicable throughout the state. The legislature's bill becomes law when signed by the governor. The statute may give cities, counties, or other divisions of local government authority to adopt later versions of the code or stricter provisions. This practice maintains a minimum state standard, below which no entity of local government may go. The state could also preempt local regulation, not allowing any variation in the state-adopted codes. This creates uniformity of regulation within the state. Both methods of adoption create results that will be different than would occur if the state legislature debated and adopted their own code because:

- Persons who write codes for private organizations are usually experts in their field. Assembling a similar group for each state's building codes would be both difficult and inefficient.
- Writers of private codes may have a financial interest in the manufacture and sale of equipment that may be required by the code.
- Although a private code is adopted by the state, causing the provisions of the code to operate as law, the users usually must purchase the code

from its owner. This is unusual in the American legal system but common in the construction industry. The notion of free access to printed copies of laws that affect us, based on ideas of due process, would deprive private code writers of a chief source of revenue and would destroy the present system of partial regional code uniformity.

There are instances where payment for access to codes is not required because they are written by a governmental body or the contract stipulates public ownership of the work output. If a state owns the code, or has otherwise acquired the right to publish the code, it will likely be printed in the state's

**OWNERS MUST BE VOCAL WHEN RULES ARE INTRODUCED THAT EXCEED THE AUTHORITY GRANTED BY THE LEGISLATIVE BODY, THAT DO NOT PROMOTE HEALTH AND SAFETY, OR THAT UNDULY INTERFERE WITH THE LEGITIMATE DESIGN CHOICES OF THE OWNER.**

regulatory code, such as the California Code of Regulations (CCR).

What happens at the state level is similar to the regulatory practices of the U.S. government. Congress passes statutes, which are signed into law by the President. These statutes often leave detailed regulations to an agency or department. That entity writes regulations to enforce the statute. The statutes are found most commonly in the U.S.C.A. (United States Code Annotated), and the regulations that

are adopted are published in the C.F.R. (Code of Federal Regulations).

Those making design and planning decisions should be keenly aware of the statement made in their civics and government classes stating that federal law is supreme and supersedes in the event of conflict with state law. This is especially applicable in the context of the Americans with Disabilities Act (ADA). This is a field that affects building planners, designers and operations staff. They must be keenly aware of the interplay of state law with federal, and the seemingly ever-changing legal landscape in this area. The complexity of the ADA is beyond the scope of this article, but suffice it to say that determining whether a facility planned for renovation is new or existing is important, and various federal laws provide different threshold dates. Also important is whether a building is private, public, and whether the state's

regulations have been accepted as presumptively compliant by the Department of Justice. General recommendations for ADA are:

- Analyze the various regulations.
- Unless you are current in your specialized knowledge in this area, get help from someone who is.
- If an improvement to your facility is planned, resolve associated accessibility issues by following the ADAAG (ADA Accessibility Guidelines) unless doing so is inconsistent with a




known regulation that is lawful and applicable. Any contrary decision should be made with extreme caution for three reasons: you are probably making accessibility more difficult or impossible for those who need it, you may be exposing your employer to litigation and fines, and you may have to add the improvement in the near future at greater expense, either because of an erroneous analysis or a change in the law.

The codes applicable to our buildings can provide much benefit to owners and the public by assuring standards of quality and safety. New and evolving needs can be addressed that are important for life safety, such as the codification of new requirements for seismic safety. However, there is an unsettling trend in some of our regulations. Owners must be vocal when rules are introduced that exceed the authority granted by the legislative body, that do not promote health and safety, or that unduly interfere with the legitimate design choices of the owner.

Designers often discuss code issues with local officials. This is a healthy process, where subtleties and rationale can be discussed. These discussions often lead to sensible decisions. However, code decisions are not frequently appealed. Does this impair the development of consistent code interpretations over time and throughout a jurisdiction? Does it assure that illogical interpretations are adequately questioned?

As with many American institutions, our building codes and enforcement processes work well despite challenges. Credit for this is owed to private associations, government entities, contractors, professional associations, and trade groups. We have shown an ability to study failures, as demonstrated by fires, and methodically modify existing private codes. Earthquakes have triggered a federal response, with new codes announced by the Federal Emergency Management Agency (FEMA), and are available for state adoption.

This capacity to study past practices and willingness to solve new problems through codes is essential for the success of facility operators, owners, and designers. It allows the public to have confidence in the safety and regulations associated with our buildings. 

Rich Davis is the facilities engineer at the Evergreen State College, a public liberal arts college in Olympia, WA. He serves on APPA's Code Advocacy Task Force and can be reached at [davisr@evergreen.edu](mailto:davisr@evergreen.edu). This is his first article for *Facilities Manager*.



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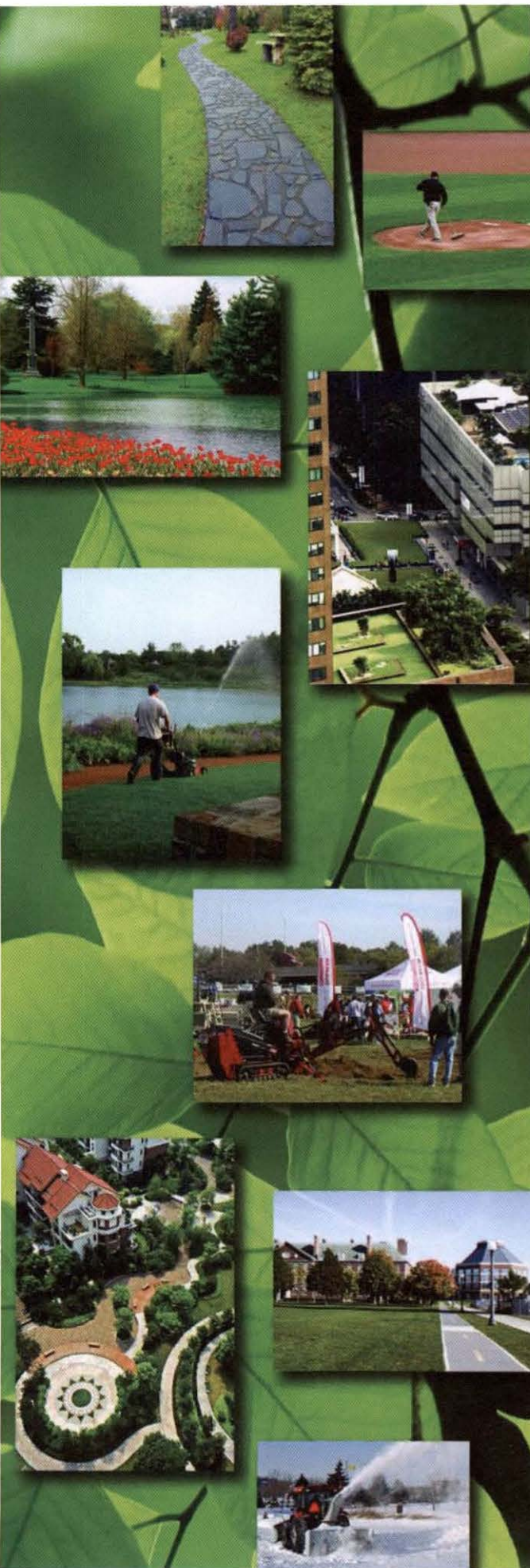
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Book Review Editor: Theodore J. Weidner, Ph.D., P.E., AIA

**Rising to leadership is the theme of this issue,** and focus of the books reviewed this month. I certainly hope there are parallels between the message delivered in the classroom at the Institute for Facilities Management and the two books below. They are both manageable in size, and beneficial for those who aspire to a leadership role.

I am appreciative of Suzanne Drew's work on this column (no longer with the University of Nebraska) due to her strong leadership skills. I'll miss working with her, but hope to provide you with additional examples of her insights in upcoming book reviews while in her new role at a private corporation.

—TW

*Reviewed by Suzanne Drew*

**REINVENTION: HOW TO MAKE THE REST OF YOUR LIFE THE BEST OF YOUR LIFE**

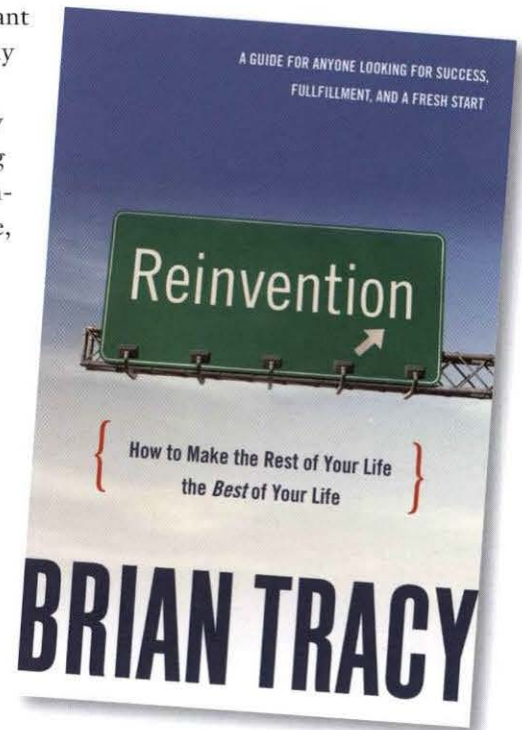
By Brian Tracy, AMACOM, New York, 2009. 215 pages, hardcover, \$21.95

**H**ere's something to think about: Within the next two years, 72 percent of people working today will be in different jobs in the same or different company and have different responsibilities requiring different talents and skills to achieve different results. Whether change is something we seek or hope to avoid, it is inevitable. In *Reinvention: How To Make The Rest Of Your Life The Best Of Your Life*, author Brian Tracy provides some good advice, a handful of exercises, and a framework to follow to help anyone gain control of and make the best of changes in circumstance.

As luck would have it, soon after I began reading this book a friend of mine called to say she had lost her job: a victim of the economy, closer to retirement than college graduation, with a set of skills in which she was losing

confidence. While this book is relevant and useful to anyone dealing with any change, it is particularly well-suited for people changing jobs, voluntarily or otherwise, and so I began drawing upon it and referring to it in our conversations. We discussed for example, the six stages of regaining control (based on the six stages of grief) and how you work through them. She was able to take comfort in the fact that the turmoil and distress she felt was normal and transitory.

We talked about what she is best at and those things she'd like to learn. We talked about what she wants out of the seven main areas of life described in the book: business and career, family and relationships, health and fitness, financial independence, knowledge and skill, social and community involvement, and spiritual development and inner peace. Thinking these things through seemed to help her keep perspective and avoid becoming immobilized by immediate circumstances. I even drew on the



plans to respond to and take advantage of ever changing environments, expectations, opportunities, and threats. In this book, he shows how the same analysis and process help individuals

**THE AUTHOR REFERS TO A STUDY OF OLDER PEOPLE, MANY PAST THEIR 100TH BIRTHDAY, WHO WERE ASKED WHAT THEY WOULD DO DIFFERENTLY IF THEY COULD LIVE THEIR LIVES OVER AGAIN.**

book's exercises and suggestions for goal setting and action planning during our discussions, which again seemed to help her regain a sense of control and focus on the future. Essentially, she and I worked through much of the first three chapters of the book, and eventually, I bought her a copy of her own.

Author Brian Tracy talks about how he helps corporations create strategic

do the same. His writing is quickly and easily read. Most topics cover about a page and his exercises are equally short and sensible. His stories are engaging and repeatable.

The author refers to a study of older people, many past their 100th birthday, who were asked what they would do differently if they could live their lives over again. The answers, he reports,



were consistent: they would take more risks and chances; they would worry less; and they would take more time to stop and think about what was important to them. And, that is exactly what this book accomplishes: it provides a short and easy-to-use frame work to help you evaluate and prioritize what you really want and value, it provides some words of wisdom and support to ease the worry and anxiety associated with change and transitions, and finally gives some good and direct advice on how to respond to and/or initiate change in your life and career. All in all, it could be a useful friend to have on the shelf if and when you or someone you know might need it.

*Reviewed by Ted Weidner*

#### **LEADERSHIP ENERGY (E=MC<sup>2</sup>): A HIGH-VELOCITY FORMULA TO ENERGIZE YOUR TEAM, CUSTOMERS AND PROFITS**

By David Cottrell, Cornerstone Leadership Group, 2008. Softcover, 108 pages, \$14.95

**I**t is my assumption that most of my Leadership consists of leaders or people who want to be leaders. That's one reason why there are many books on leadership rather than a many books on technical issues. Because of that, while I read a lot of leadership books, there are some that are more impressive than others.

*Leadership Energy* is impressive. I have to admit, when I started reading it that was not my first impression. The title and introduction seem to lean too heavily on Albert Einstein, a great scientist who was not known for leadership, but instead for developing a controversial set of theories for contemporary physicists. The book has at least one quote from Einstein per chapter, some have nearly half a dozen; but these quotes don't make the book, they support it.

*Leadership Energy* opens with a description of the parallelism between  $E = mc^2$  and organizational leadership. The energy of an organization is equal to the mass of the organization (its people) times the leader's energy, i.e., the

reader's commitment to inspiring and maintaining vitality in the organization. Examples are presented in nine brief chapters to demonstrate how energy might flow out of the organization and how it can be maintained or increase with some improvements in the actual leadership activities.

Parallels between the equation and organizational leadership are made throughout the book. Energy is sapped by poor performers in the organization, and increased by the stars and the ones who "get it" (understand the organizational mission and vision). This includes the leader who expected to 'walk the talk.' Examples are somewhat timely: General Motors didn't have good energy; Southwest does as do Starbucks, Cirque de Soleil, and Chik-fil-A. That doesn't mean they always succeed, but they certainly do better than others given the same setting.

As I reflect on the past year (when I had to respond to a customer base that was extremely dissatisfied with a service

**EXAMPLES ARE PRESENTED IN NINE BRIEF CHAPTERS TO DEMONSTRATE HOW ENERGY MIGHT FLOW OUT OF THE ORGANIZATION AND HOW IT CAN BE MAINTAINED OR INCREASE WITH SOME IMPROVEMENTS IN THE ACTUAL LEADERSHIP ACTIVITIES.**

delivery team in my organization), I see many parallels of things I've done in the past year to respond and to lead a better team. It hasn't been easy. I've had sleepless nights, self doubts, and disappointments. However, as the author says, these things are not easy; they are essential for success.

As I look at the many higher education facility organizations I've known, the challenge hasn't been the people (m), who have been generally good and committed to the organization. It has been the leaders (directors, managers, and supervisors) who didn't maintain the "c<sup>2</sup>" leadership

# **LEADERSHIP ENERGY**

**(E=mc<sup>2</sup>)**

A High-Velocity Formula to Energize Your Team, Customers and Profits

**DAVID COTTRELL**

energy needed to keep the organization successful (E). This book does an excellent job of describing what is needed to have high energy and be successful. It's

good because it is clear, doesn't spend a lot of time making a point, and is of a length that will allow many busy leaders to read it in an hour or two and still get the message clearly. ☺

Ted Weidner is assistant vice chancellor of facilities management & planning at the University of Nebraska-Lincoln and president of Facility Asset Consulting. E-mail him at [tweidner2@unlnotes.unl.edu](mailto:tweidner2@unlnotes.unl.edu). Suzanne Drew is Sr. HR Generalist at Novartis Consumer Health and can be reached at [suzanne.drew@novartis.com](mailto:suzanne.drew@novartis.com)





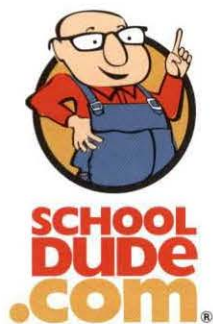
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# Professional Development

## WRAP-UP

### APPA SPLASHES INTO FT. LAUDERDALE FOR A WEEK OF LEADERSHIP TRAINING


By Suzanne Healy

**F**t. Lauderdale, Florida played host to APPA's most recent week of professional development. Facilities professionals from around the world participated in a week-long program that offered educational training in individual effectiveness skills, interpersonal effectiveness skills, managerial effectiveness skills, and organizational skills at APPA's Leadership Academy.

The success of this delivery is due to the dedicated faculty and trainers who continue to raise the level of professional development allowing APPA to provide premier training. A special thanks to the faculty of the Academy: Lander Medlin and Glenn Smith representing Track I; Ann Jenkins and Charles Andersen representing Track II; James Cole, David Judges, and Matt Adams representing Track III; and Jack Hug, Doug Christensen, and Christina Hills representing Track IV. Without their expertise and dedication, we would not be able to provide the outstanding quality that we do at the Academy.

We concluded the week with a celebration to mark the completion of a week of hard work by all and congratulate the work of those who officially graduated from the Academy. We additionally recognized individuals who had graduated under

the historical format of the Academy but chose to return to complete the fourth track of new content.

It was a week of outstanding training, wonderful networking, and visiting with old friends and meeting new colleagues. We look forward to seeing all at the next APPA professional development opportunity. For the latest dates of registration, please visit [www.appa.org/training](http://www.appa.org/training). 

Suzanne Healy is APPA's director of professional development. She can be reached at [suzanne@appa.org](mailto:suzanne@appa.org).



*Michael Ruland, University of Houston/Victoria*

*Shelton Riley, Texas Christian University*

*Syed Zaidi, East Stroudsburg University*

*Brittney Spears, Xavier University of Louisiana*

*Joseph Wojtysiak, Harrisburg Area Community College*

*Frank Bennett, Dallas County Community College District*

*Lowell Hanson, University of Michigan/Ann Arbor (absent)*

*Susan Reynolds, Rose-Hulman Institute of Technology (absent)*



Compiled by Gerry Van Treeck

**AMTC** manufactures the HYBRID-FLUSH Model AEF-801 retrofit kit for urinals and toilets. The design of the HYBRIDFLUSH is ideal for educational facilities to lower maintenance and water costs. The HYBRIDFLUSH includes AMTC's patented BRV mechanism that uses reliable all-brass cam-gear technology to replace the unreliable solenoid mechanism. The design allows for the original flush handle or a push button to function as an alternate "mechanical" flush option that always works (even when batteries are drained). The unit is powered by 4-AA batteries (no water shut-off required when replacing) and includes a low/hi volume adjustment option. The HYBRIDFLUSH retrofit kit can convert 1.0gpf urinals into high efficiency 0.5gpf fixtures and 1.6gpf toilets into high efficiency 1.28gpf fixtures without the need to replace the entire fixture. For more information visit AMTC [www.amtcorporation.com](http://www.amtcorporation.com).



**Delta Controls** introduces the Delta HMI, a seven-inch diagonal color touchscreen interface that allows operators to manage building HVAC systems by using custom real-time graphics. The Delta HMI can be mounted in mechanical rooms or public spaces, allowing for monitoring equipments status, setting schedules, adjusting temperature setpoints, and viewing floor layouts. For greater detail visit Delta Controls at [www.deltacontrols.com](http://www.deltacontrols.com).



**DDP** has developed a customizable, linear wall wash LED lighting system that combines a stylish look with a rugged and high-performance design. Part of the Emerge LED Lighting product family, the LED WashGraze(r) is an energy-efficient solution that features a unique, patent-pending optical configuration with user-specifiable viewing angles that significantly reduce light loss and maximize efficacy. The IP67-rated LED WashGraze is the brightest linear solid-state lighting (SSL) fixture on the market and is

ideal for interior or exterior applications, as it can withstand the most challenging environmental conditions. The LED WashGraze system provides a high efficacy within a streamlined mechanical size, allowing lighting designers to hide the fixture and only deliver light, not the source of the light. For additional details about DDP visit [www.ddpleds.com](http://www.ddpleds.com).

**Pelican Products, Inc.**, a leader in the design and manufacture of virtually indestructible cases, has introduced the 1090 HardBack™ Case as watertight/crush-resistant armor for laptops. Designed to fit in most soft bags and protect laptops up to 15" (including brands such as Apple®, Dell® and Sony®) from the rigors of travel, the 1090 sports a high-impact, heat and chemically resistant, composite shell that will stand up to some of the harshest conditions. As additional protection, the case features a shock-absorbing plush foam liner (with impact-protection cell cushions) and a strong, easy-snap, anodized aluminum latch (with stainless steel hinge pins) to ensure that the computer stays secure and scratch free. The case's tongue-and-groove lid construction and polymer o-ring creates a watertight seal and its built-in, automatic pressure equalization valve keeps moisture out and makes it easier to open the case at any altitude. For more information, visit Pelican Products, Inc. at [www.pelican.com](http://www.pelican.com).




**TyRex, LLC** introduces the TY5100 auto-feed screwdriver with speeds of up to 5000 RPM for increased productivity in commercial construction applications. Featuring a fully-integrated design, the TY5100 offers better balance and smooth operation, which means less user fatigue than traditional attachment-type tools. A patented Corner-Fit™ feed system allows for placement of screws in corners and around obstructions, while a patented clutch disengages when screw is sufficiently set – to eliminate stripped out heads and prolong bit life. The variable speed trigger allows precision fastening at speeds from 0-5000 RPM, and "feathering" of fasteners for improved control. For more information about TyRex, LLC visit [www.tyrextools.com](http://www.tyrextools.com).





**Tregaskiss** now offers its semi-automatic TOUGH GUN™ MIG Guns. These air- and water-cooled MIG guns are built-to-order and feature durable and easy-to-maintain components that lower the total cost of ownership. TOUGH GUN Air-Cooled MIG Guns are available in 350- to 650-amp models, while the water-cooled versions offer 400- and 600-amp capabilities. Both gun models include a durable cable strain relief on the front and back ends

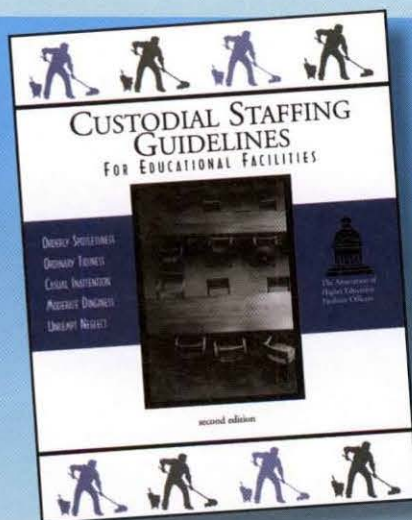
to prevent kinking and abrasion, minimizing the time and cost for cable replacement. All TOUGH GUN MIG Guns also feature Tregaskiss' Lifetime Warranty on handles and switches—if either component breaks, Tregaskiss will replace them for free. For further information visit Tregaskiss at [www.tregaskiss.com](http://www.tregaskiss.com). 

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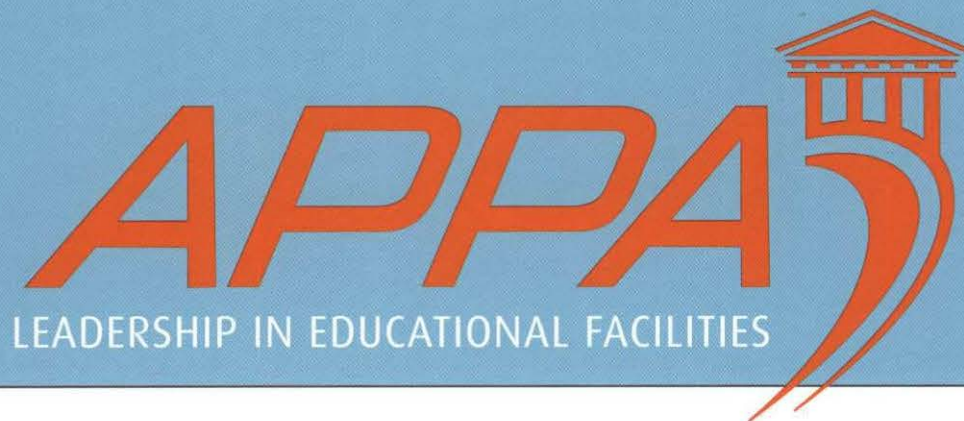
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# 2008 2009 ANNUAL REPORT





# PRESIDENT'S REPORT



By William M. Elvey

It is hard to believe that my year as your President is coming to an end. I would like to thank all of the members, the APPA Board of Directors, Lander Medlin, our Executive Vice President, and all of the APPA staff for their hard work and support during this past year. It has been an honor to serve as a volunteer leader of such a great

organization as APPA. It has been an honor to interact with the APPA staff, and it was also a delightful and a rewarding experience to visit with two of our regions (ERAPPA and SRAPPA) and their membership during the regional conferences last fall. I also had the opportunity to attend the AUDE 2009 meeting held in the United Kingdom last April. As a result, I am pleased to advise that the status of the international strategic alliance between APPA and AUDE is indeed strong.

I think that we got off to a fast start last July 2008, and I was particularly pleased when the Board quickly passed a motion to approve the introduction of a virtual APPA Membership Directory starting this year. The transition was very smooth and apparently successful. Despite some apprehension for doing this in the past, it appears that we have instead charted a new course for the future. This accomplished several objectives: First, an all-electronic APPA Membership Directory is the sustainable thing to do. Secondly, and perhaps just as important, the transition to an all-electronic Membership Directory should save approximately \$50,000 annually in operating costs. Thus, this is an important step in maintaining a sound fiscal posture during times of significant budgetary constraints.

Despite the new format, APPA has strived to maintain the same content, look, and feel of the previous publication. Thus, many of the important reference documents such as APPA's Strategic Plan, 7 Key Strategies, Brand Identity, Staff, Programs, Awards, Calendar of Events, Membership Categories, 2008-2009 Board of Directors, Regional Representatives, Committees and Task Force, Past Presidents, and the APPA Bylaws are still an integral part of the Membership Directory.

Other features of the electronic Membership Directory include:

- Opportunities for advertising to help offset production costs;
- Hyperlinks to Web pages of business partners; and,
- A virtual directory with a robust search engine.

A second accomplishment of the July 2008 Board meeting

was to approve a motion to allow proxy voting in this year's annual election. The APPA staff subsequently developed a methodology for doing this, and I am pleased to note that we did experience an increase in voting participation in the officer election process. This action was also in keeping with my theme for this year as – *The Year of Engagement*.

We have opened up the nominations process considerably

**The results of our multilateral effort to help get out the vote and increase membership participation in the elections process has paid off; this year we saw a 33 percent increase over last year's elections.**

and improved the transparency of the process by posting a nominations package including job descriptions, and we have instituted a self-nomination process as recommended by last year's Voting Assessment Task Force. I am very pleased to see that the Nominations Committee was able to identify at least two highly qualified candidates for all available elected officer positions (i.e., President-Elect, Secretary-Treasurer, Vice President for Professional Affairs) in this year's election.

The culmination of our new **nomination process** has occurred with the first-ever "Election Forum" webinar, which occurred on March 30 and has been archived on the APPA website for your viewing convenience. Voting went live on April 1 and, as mentioned above, included a designated "proxy" as part of the membership renewal invoicing process. This option was available to institutional representatives who did not choose to vote. The results of our multilateral effort to help get out the vote and increase membership participation in the elections process has paid off; this year we saw a 33 percent increase over last year's elections.

You may remember that in July 2008 I issued a challenge to APPA/Lander Medlin and this year's Board to develop a balanced budget for FY 2009 – 2010. Little did I know when this challenge was made that the importance of doing so would become more critical than ever—a few months later the evidence of a faltering national economy became apparent. And, while the lingering effects of this economic situation are still looming large, I am confident that we can meet this chal-



lenge by making the corresponding hard decisions needed to change the way we have done business in the past by becoming more efficient and effective than ever before. The goal of achieving a balanced budget for next year became a reality during the February 2009 virtual Winter Board meeting. The virtual Winter Board meeting was another first for APPA that helped reduce our deficit for the last fiscal year and also helped reduce APPA's carbon footprint.

I have strived to improve communication among the Board and with the Regional Presidents and Regional Representatives by establishing a monthly reporting process from the Vice Presidents. This new process appears to have accomplished the objective. In fact, as an effort to continue to improve communication up and down the APPA organizational structure, we will be implementing an increased number of conference calls and expanding those participating in these calls considerably this next year. This action should enhance communication and ensure greater connectivity in these tough economic times, and may also spawn new local delivery options/ideas.

At the November 2008 Executive Committee meeting we began a process that will lead to the update of APPA's Strategic Plan as early as next year. Our discussions centered around four specific strategic areas: financial, membership, business development, and sustainability. Our discussions were in-depth and comprehensive and they will hopefully provide a foundation leading the way forward for Polly Pinney and next year's Board to complete the effort.

I have been able to actively participate in the planning process for APPA 2009 beginning with a Programming Committee meeting held in August 2008 and the monthly conference calls

held since. The speakers and program lineup for **APPA 2009: Focusing on The Critical Few** is very strong, and I am confident that under the leadership of David Gray, Vice President for Professional Development, Ben Elisondo, Planning Committee Chair, Suzanne Healy, Director of Professional Development, the APPA staff, and the rest of the APPA 2009 Planning Committee, we will have another highly successful annual conference in Vancouver, British Columbia in July 2009.

My involvement on the NACUBO-led National Campus Safety and Security Project has continued. This is also a CFAR project. I have also been actively participating in a separate NAEP/E&I Facilities Strategy Team with both Past APPA President Maggie Kinnaman, and our EVP Lander Medlin. The purpose of this effort is to help E&I identify and establish national higher education cooperative purchasing agreements (contracts) that can help educational facilities professionals leverage their purchasing power according to their highest and greatest (but currently unmet) facilities needs. This is an important initiative that can provide a timely tool to help our facilities professionals lower their cost of delivering products and services to their institutions.

Finally, I look forward to serving APPA as your Immediate Past President next year. I am confident that as facilities professionals we will rise to any and all challenges that might face us along the way, and I am certain that APPA will emerge from the current circumstances stronger and more capable than ever. I encourage all of our members to engage APPA in every way possible. I think that you will find, as I have, that the rewards from doing so are incredible. Thanks again to all of you for allowing me to serve. ■

## IMMEDIATE PAST PRESIDENT'S REPORT

By Alan S. Bigger



It is hard to believe that five years have gone by since I started serving on the APPA Executive Committee, initially as Vice President for Professional Affairs and then the presidency. There is no doubt that this would never have occurred if it hadn't been for each member's support and encouragement.

Years ago an insurance company coined the phrase, "You are in good hands with...." A review of APPA over the decades clearly indicates that APPA has been, and still is, in good hands: the hands of its members. As I look back on the past few years with APPA, admittedly with some nostalgia, there are several themes that have emerged that clearly demonstrate the fact that APPA is, and will continue to be, a world-class organization.

- **APPA is a member organization.** APPA is only as strong as its membership. As I have had an opportunity to



travel around, it is very evident that the future of APPA is in good hands – yours!

- **APPA is a viable organization** for the future, as vibrant members become active in the organization at the chapter, regional, and international levels. Are you involved? With involvement comes a sense of accomplishment.
- **APPA is a highly valued organization in the profession.** Increasingly, APPA's articles, magazine, research, publications, and benchmarking studies are becoming the hallmark of the facilities profession. Use these, and contribute to these great works.
- **APPA is a nurturing organization.** Over 20 years ago a member of APPA asked me to attend a meeting and mentored me at that meeting and beyond. Later some other APPA members encouraged me to become involved at the regional level and then on the APPA Board. In order to keep members interested we must reach out to mentor and nurture them. The future life-blood of the organization is the new member. Take a few moments to nurture and engage a new facilities professional as a member, and get him or her involved at the local level. Involvement today builds commitment for tomorrow.
- **APPA is a flexible organization.** Over three years ago APPA embarked on the 7 Key Strategies (see *Facilities Manager*, May/June 2006, pp. 10-11). The 7 Key Strategies repositioned APPA to be in the forefront of all associations that serve the facilities management arena. APPA is increasingly becoming the "go to" resource for the profession.
- **APPA is a teaching organization.** Thanks to the incredible involvement of the membership, committees, and APPA staff, APPA affords the facilities professional a continuum of education programs that will assist in the total career development of members – from supervisory training, the APPA Institute, Leadership Academy, certification, research (Center for Facilities Research), and the APPA Fellow program, with refreshers provided by the annual APPA conferences, the Senior Facility Officers Summit and the Thought Leaders series. Where are you on the continuum? Now is the time to take the next step!
- **APPA is a networking organization.** We learn much through conferences and formal training sessions, however over and over again I have heard people say that one of APPA's greatest attributes is the networking component. Whether it is by e-mail, phone, face to face or even an audio/visual teleconference, we have a worldwide network of members that stand tall to support us in our endeavors and

to provide us with advice. During the recent webinar that introduced the candidates for APPA officer positions for this year, nearly every candidate stressed how important networking through APPA has been for their career and institution.

- **APPA is a collaborative organization.** APPA has reached out the hand of fellowship to organizations nationally and internationally. The synergy of these collaborations has strengthened APPA's body of knowledge and clearly positioned APPA a world leader amongst organizations.
- **APPA is a research organization.** With the inception of the Center for Facilities Research (CFaR), APPA has developed highly credible research that can be used by members to enrich their organizations and assist APPA members to have a seat at their institution's governance table. The viability of this research is dependent upon each member. Now is the time to develop research topics and studies that will enrich the profession.
- **APPA is a virtual organization.** Gone are the days of passive membership programs, seminars, and mailings. APPA now has a highly sophisticated website and search engine. Seminars and programs are no longer anchored to the traditional podium, now the virtual screen is the window to the world, and APPA has taken the opportunity to host webinars and even a recent Board meeting in the virtual world. The virtual conference and webinar format provides low-cost training with no need to travel. This helps us to extend our resources while minimizing the carbon footprint of APPA member organizations.

We hear much about the tight economic times that nations and institutions are facing. We have faced these before and survived and there is no doubt that we will do so again. It is with sincerest gratitude that I thank Jack Colby, Chris Ahoy, Bill Elvey, and Polly Pinney, not only for their professionalism, but also for their friendship and encouragement. The APPA executive leadership is in good hands with Polly, Bill, and Darrel and is strategically positioned to advance the facilities profession during the years ahead. I would be remiss if I did not commend the APPA staff, Lander Medlin and John Bernhards for their dynamic work in implementing the 7 Key Strategies and for guiding APPA to be the best of the best organizations.

Finally, none of the amazing APPA journey would have been possible without the loving support, dedication, and hard work of my wife Linda, and the patience of sons Stephen and Phillip. Stephen and Phillip have enjoyed APPA so much that I believe they want to be lifetime members! Thank you APPAland, the future is in good hands...yours! ■



# PRESIDENT-ELECT'S REPORT



By Polly Pinney

Let me begin by saying I am incredibly honored and humbled to have the opportunity to serve as APPA's President-Elect. "Learning the ropes" has been an exciting and challenging task, but I have been blessed with the assistance of two extraordinary role models in Alan Bigger, APPA Past President, and Bill Elvey, APPA

President. With their guidance I have begun the transition.

It has been a truly busy time since we met in San Antonio for our exceptional APPA 2008 conference. September brought the TEMC Conference in New Zealand and trips to our partners in Australia and Singapore. I am indeed more convinced than ever that our alliances with our international partners enrich and inform our profession.

December brought committee meetings in Alexandria, a visit to the Women's Leadership Institute in Florida, and the opportunity to meet and spend some time with several of our "up and coming" facilities professionals during the collaborative effort of APPA and our CHEMA colleagues. Multiple conference calls and our first-ever virtual Board meeting rounded out some of the events, followed by a trip to North Carolina for the Senior Facility Officers Summit.

During the past year I've had great opportunity to spend time contemplating the next year as APPA President. I've looked back at the past leadership of APPA and each of the significant steps that have led us to our current path. Jack Colby and the 7 Key Strategies; Chris Ahoy and the alignment of our organization; Alan Bigger and Carpe Deim, Renovare, and Kaizen; and our current President Bill Elvey and his devotion to balancing our financial picture, and his call to arms for each member to be engaged. During these times, APPA gave life to the SFO, the EFP and CEFPP Certifications, the Thought Leaders series, a new brand identity, an improved elections process, a Facebook page, and an improved Web presence, to name but a few accomplishments. Quite a track record for movement from concept to implementation!

Simon Bailey, noted speaker and author, likens the development of people and organizations to the formation of diamonds, honed by heat and pressure – polished to reach brilliance.

In these turbulent and somewhat daunting times of heat and pressure, it may be tempting for us to retreat to our campuses and try to hold steady and stem the tide by concentrating solely on our financial struggles or our immediate

organizational needs. While I must admit this is certainly a needed response, I would assert that at just such moments we need to do much, much more. Organizations that are dedicated to building their most valuable resource—their team members—will be the ones to survive and thrive in the coming years. And APPA, an organization dedicated to the development and elevation of facilities professionals, is uniquely positioned to do just that for our membership. Times are hard right now, and our current business models are struggling. But the heat and pressure we are experiencing is opening an opportunity for us. An opportunity to revisit our services and our strategies, to assure we are on track to help our members hone the brilliance of their team members and their organizations.

The next year will be one of strategic renewal. We will search for opportunities to work smarter and more efficiently; to partner and leverage our services; and to expand our services and make them more accessible at all levels.

Last year Bill Elvey encouraged every APPA member to actively participate and engage in the activities of APPA. This resonates as I write this. If we are to create brilliance in our teams and organizations we must remember that we are engaged in a marathon, not a sprint. I ask that each member take a strategic look at their organization. Where are the diamonds and how will you polish them to brilliance? How can APPA be your partner in this journey? What long-term strategies may we be of assistance with?

As we prepare to remove my training wheels, I will close by thanking the APPA staff, our dedicated volunteer workforce of Board and committees, and the membership for all the hard work that produce our services, and allows us the opportunities to polish our diamonds. I must also thank Alan Bigger and Bill Elvey for their patience, candor, and friendship as they helped me to prepare for this coming year. I am most grateful for their unwavering support and kindness.

As I now look forward to this summer, I believe I can say that, I have learned much...but there is much yet to learn. We are embroiled in very challenging times. We will need to examine much about what we do, and how we can do it. It is not going to be an easy time for APPA, as it is not an easy one for our campus communities. Much of what lies ahead we do not know yet. But I do know these things:

APPA and the network of information, assistance and strategies it offers are even more important as we all work to keep things on track and polish our diamonds.

Thanks to a visionary foundation begun by Jack Colby and



carried forward by Chris Ahoy, Alan Bigger, and Bill Elvey, we have a strong core of programs built on strategic assessment.

Inside every challenge is an opportunity waiting to emerge. We will need to explore reinventing ourselves to meet the times and needs.

Difficult times call for strong steady responses. I am convinced the team that we have, our Board, our regions, our committees, and our dedicated APPA staff have the commitment, expertise, and diligence to meet our chal-

lenges. I look forward to working together to continue developing and refining APPA, our Organization of Excellence, the organization of choice for educational facilities professionals. May your horizons hold the treasure of diamonds – polished and brilliant. ■

## SECRETARY-TREASURER'S REPORT

6



By Nancy Hurt

APPA has successfully completed its five-year plan for implementation of the 7 Key Strategies in a short, three-year period. This positions APPA as the association of choice for educational facilities professionals well into the future. To effectively achieve this end in such a short period

of time, a significant outlay of resources was necessary and expected as reflected in the overall five-year business plan.

Unfortunately, the global economic downturn has had a significant negative impact on APPA's financial situation this year ending March 31, 2009. Indeed, this year we posted a deficit of \$510,588 in the operation (exclusive of the loss in long-term equity investment) as we invested heavily in the implementation of the futures-focused 7 Key Strategies and experienced less than satisfactory returns on our face-to-face educational programs. Additional revenue and expense shortfalls from the APPA 2008 conference and publications and job advertising sales contributed significantly to this deficit. The Board's decision to meet "virtually" this past February was an important step in our attempt to arrest a ballooning deficit situation. In addition, we are taking active steps to refocus and recalibrate all professional development programs and their delivery in the coming fiscal year (2009-2010) to achieve a balanced budget.

As expected, over half of our reserves have been used for this "rainy day" situation resulting in reserves presently totaling \$245,000. And, our equity investment suffered

losses as a result of the plummeting stock market as well. Nevertheless, our cash position remains positive. Additional adjustments in income streams and expenditures will be forthcoming to balance such losses in the coming year. The APPA headquarters building was assessed at approximately \$2.3 million in February 2009 by the City of Alexandria and the building is fully paid (no loss in value so far).

Graph 1 shows the six-year history of revenues and expenses for APPA. Graph 2 shows the year's revenues and expenses by activity category. Membership expenses (totaling \$573,855) reflect the direct cost of membership department salaries; benefits; travel and outreach efforts; printing, production and mailing of promotional materials and the membership directory; and other program supplies and equipment needs. However, membership dues also support the direct cost of many APPA activities such as website and database management; research and development; and a portion of office operation and governance. Revenues and expenses are planned and monitored by staff and the APPA Board to achieve APPA's mission to support educational excellence with quality leadership and professional management through education, research, and recognition.

Given stock market conditions and the global economy, APPA's long-term equity investments dipped reflecting a loss of \$120,255 during the past year. Fluctuations in the magnitude of returns from year to year are expected to occur. However, given the present state of the economy, the Board has decided to hold off reassessment of this investment policy until the equities market fluctuations stabilize.

Suffice it to say that we are all experiencing tough eco-



conomic times, and the APPA organization is no different. Nonetheless, the Board and the APPA staff remain committed to arresting this negative financial swing and getting our finances back on a positive track during the coming year.

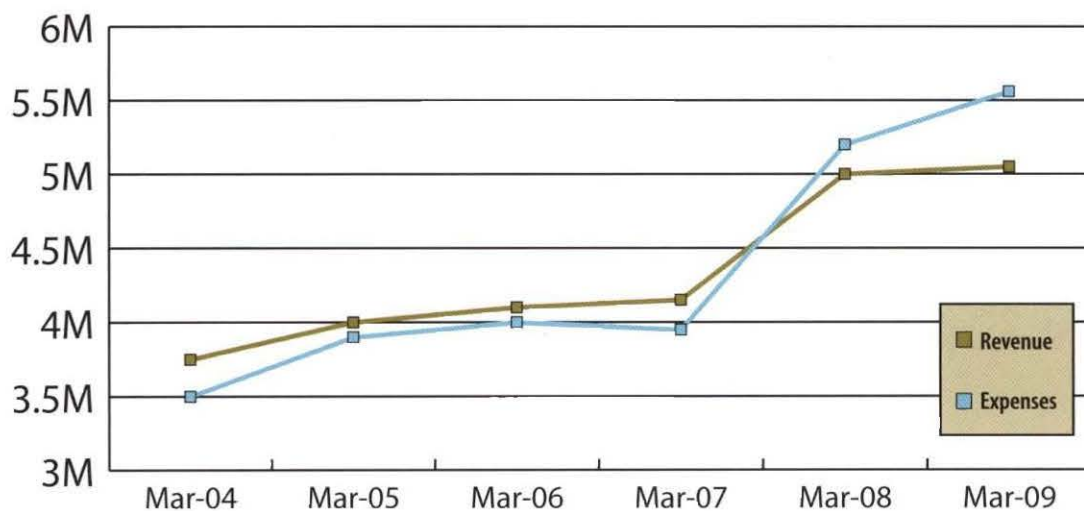
#### MEMBERSHIP COMMITTEE

As we finish another membership year, it is an excellent time to recognize the dedication and hard work of APPA's Membership Committee. I continue to see an increase in

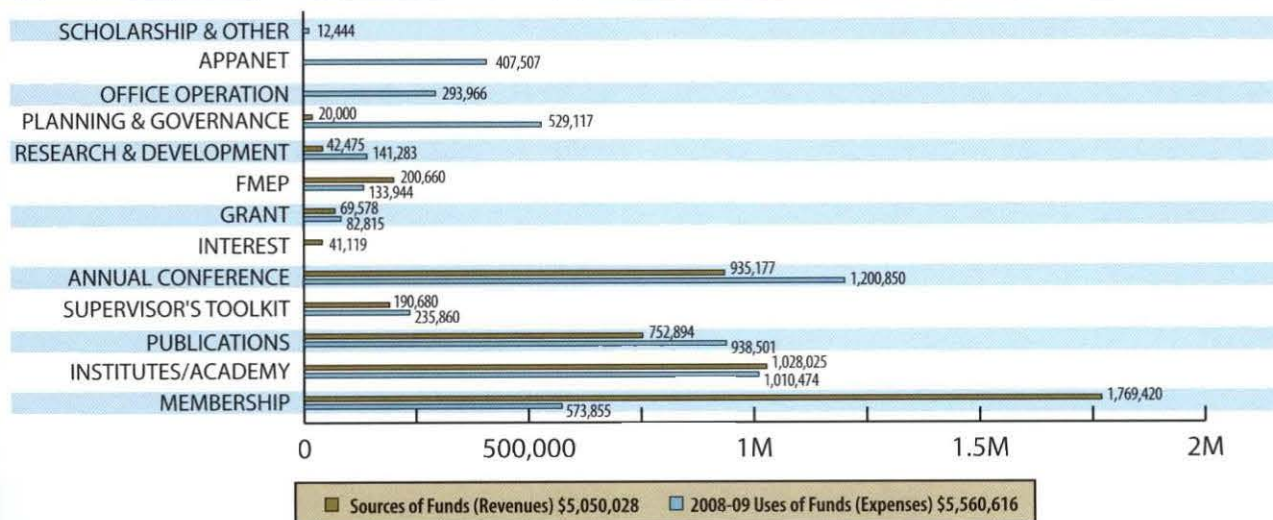
member engagement, commitment, and active participation. The committee has been energized and willing to share experiences, ideas, and resources.

This year, the committee and staff have helped APPA quietly turn an important corner on the membership front. Through a combination of a record institutional retention rate of nearly 98 percent and successful new institution recruitment efforts, APPA has reversed a decade-long slow decline in APPA institutional memberships. The committee's

GRAPH 1: APPA'S HISTORY OF REVENUE & EXPENSES



GRAPH 2: SOURCES OF FUNDS (REVENUES) & USES OF FUNDS (EXPENSES) FY 4/1/2008-3/31/2009





recent focus has been institutional members, which is the core constituency of APPA international and the regions.

Even with the wonderful membership numbers from the 2008-09 year, the committee recognizes that we face challenges for the 2009-10 membership year as a result of the economy and the budget cuts facing our educational institutions. We remain steadfastly behind the vision that APPA and its regions are a resource and community in both good times and bad.

The committee is working on initiatives that focus on the benefits membership provides. With the support and “heavy lifting” provided by the APPA staff, we are actively recruiting higher education institutions, new associate members at existing institutions, and new business partners. We reached out to potential student members, encouraging them to take advantage of free student memberships in an effort to build a network of future APPA members in support of APPA’s certification program. We continue to brainstorm ways to enhance our membership categories, ensuring inclusion and engagement of the full spectrum of educational facilities professionals.

In addition to the recruitment and retention initiatives, the committee has also spent significant time this year on the mechanics of memberships, such as support for the new

and successful online membership directory and input to the APPA Bylaws changes.

#### BYLAWS COMMITTEE

The Bylaws Committee recommended a number of changes to the APPA Board of Directors that were passed at the February 6, 2009 Board meeting. The Bylaws changes passed by the Board include:

- Modifications to several sections of Article III Membership to support last year’s Bylaws change from “Regular Member” to “Educational Institution Member.”
- Addition of Bylaws language to support Proxy Voting as passed by the Board of Directors at the July 12, 2008 Board Meeting.
- Enhanced language was added to the Emeritus Member definition to clarify the criteria for designation and to designate emeritus status of retired Meritorious Service Award recipients immediately upon application.

I extended my thanks to all the Regional Junior Representatives / Bylaws Committee for their work on these changes.

In closing, I also wish to express my sincere appreciation to the APPA staff for their exceptional efforts in support of our organization, its Board, regions, and committees. We could not accomplish everything we do without them. ■

## VICE PRESIDENT FOR PROFESSIONAL DEVELOPMENT



By David Gray

**T**he dramatic change in the economic realities for most educational institutions has recast professional development offerings that are not only *exciting* but now *essential*. These unique times call for effective leadership that will be responsive to both the urgent

training issues of today, and that will establish the important priorities that set the right course for tomorrow. APPA’s Professional Development Continuum is designed to provide a new perspective, define a roadmap for success, and impart the principles and skills required to be an effective leader.

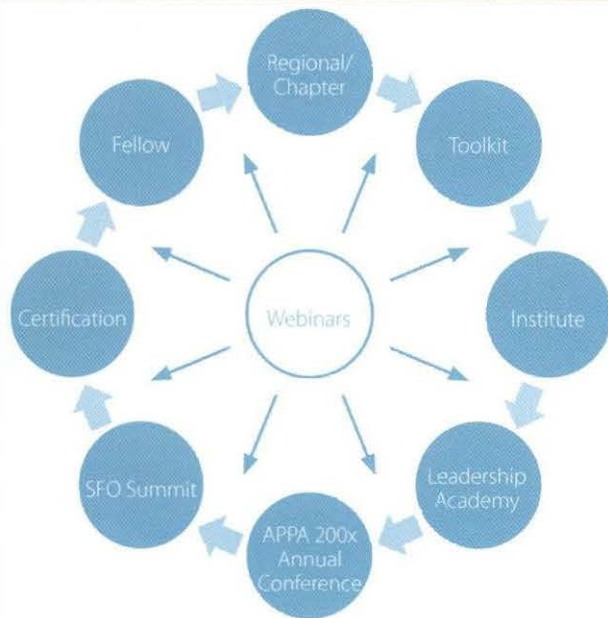
The benefit of a strong commitment to continue the technical, knowledge-based professional development offerings of APPA can be far-reaching for a campus, going

well beyond the management of facilities. Some issues are technical in nature (integrating with IT, instituting metrics for performance measurement, etc.) and others are managerial in nature (focusing on customer service, improving communications – defined as the need to communicate up the administrative chain and across department boundaries, etc.). The importance of maintaining a balance of technical savvy and people skills is critical now more than ever.

APPA has a proven track record of supporting the necessary development opportunities for each level of a facilities professional’s career. The Institute for Facilities Management and Supervisor’s Toolkit are great products that are in high demand. However, managing facilities is not what it used to be. As deferred maintenance grows, budgets become tighter, employee demographics change, and the expectations of the campus increase – i.e., *sustainability*. We need to position ourselves to not only survive but to thrive.



## PROFESSIONAL DEVELOPMENT CONTINUUM



The facilities department must now be part of the larger campus community, justifying projects and competing for resources. It would be easy for facilities professionals to look outside of APPA for this type of professional development. But why? APPA has taken several strong steps in their leadership-centered offerings. Leadership Academy, Thought Leaders Series, and SFO are examples of offerings that provide the facilities professional with leadership skills and opportunities to network with others, allowing for preparation to face the challenges ahead.

**APPA should continue to seek out the best thinkers and best practices from all business areas and industries, refine the best ideas, and incorporate them into its program offerings.**

However, APPA should look to build on these programs and not rest on them. APPA should continue to seek out the best thinkers and best practices from all business areas and industries, refine the best ideas, and incorporate them into

its program offerings. The Annual Conference is a great example of such an opportunity. There are opportunities to employ technologies (such as webcasts/webinars, etc.) that could prove to be attractive to younger professionals, be cost-effective for all, and are seen as a high priority for APPA in the coming year. APPA's new certification programs are becoming an item that many individuals are pursuing.

The APPA membership is diverse and understands the importance of alignment with its regions and chapters. The programs that each of these regions/chapters can offer will allow for the ongoing success of the Professional Development Continuum. APPA should continue to leverage the work of the regions/chapters to provide a continued balance of offering from the entry level professional to senior facilities officers.

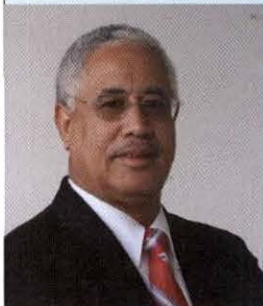
The Professional Development Committee is made up of a great group of individuals who are hard working and engaged. I wish to express my thanks to the following:

- **Professional Development Committee:** Ruthann Manlet (MAPPA), Dana Peterson (ERAPPA), Doug Riat (CAPP), Shawna Rowley (RMA), Kathleen Scheduler, (PCAPPA), Tony Yamada (SRAPPA).
- **Supervisor Toolkit Subcommittee:** Wally Glasscock – Toolkit Sub-Chair, Michelle Frederick, Carol Trexler, Nancy Yeroshefsky.
- **Institute Subcommittee:** Jay Klingel – Institute Sub-Chair, Lynne Finn, Don Guckert, Mary Vosevich.
- **Academy Subcommittee:** Doug Christensen – Academy Sub-Chair, Matt Adams, Charles Andersen, James Cole, Bill Daigneau, Jack Hug, Ann Jenkins, David Judge, Maggie Kinnaman, Lander Medlin, Glenn Smith, Tom Stepnowski.
- **APPA 2009 Subcommittee:** Ben Elisondo – Sub-Chair, Bill Elvey, President, Alan Bigger, Past President, Polly Pinney, President-Elect, Anita Bailey, Art Jones, Ruthann Manlet, Darrel Meyer, Doug Riat, Shawna Rowley, Chuck Scott, Brittney Spears, Tony Yamada, Norm Young, Dan Whitezell, John Wong, Welcome Committee Host.
- **SFO Summit Subcommittee:** Frank Brewer – Co-SFO Sub-chair, Terry Ruprecht – Co-SFO Sub-chair, Brooks Baker, Kevin Folsom, Steve Kraal.
- **Certification Board:** Jack Colby, Chair, Erin Babson, David Cain (Vice-Chair), Phil Cox, Kevin Folsom, Jim Roberts.
- **Thought Leaders Chair:** Jack Colby.

I also want to thank the APPA staff for its support and especially Suzanne Healy, director of professional development. ■



# VICE PRESIDENT FOR INFORMATION AND RESEARCH



By Randolph Hare

The past year has been a whirlwind of activity. First, we want to acknowledge the accomplishments of the Information and Research Committee under the leadership of Vickie Younger and Mike Sofield in the preceding years. As a result of their vision and tireless efforts, the operations

of the I&R committee have been revamped and raised to new levels of accomplishment. These noteworthy improvements include the development of Facilities Performance Indicators (FPI). So, kudos to Vickie, Mike, and the past I&R committee members.

FPI is a result of 15 years of development. The I&R committee members devoted countless hours to this project. APPA has made a huge financial investment as well. The latest FPI report has functionalities that address historical concerns of our campuses, and empower us with data that puts us in an advantageous position for making decisions.

A new enhancement to the 2007-2008 survey was the Essential Questions set and The Detail Set. The Essential Set provides key FPI measures but a reduced portfolio. The Detail Set gives you a complete portfolio of FPI measures.

The FPI report was released in mid-February followed by three webinars. The report enables participants to (1) contrast their campus facility with its peer institutions; (2) identify square footage and building ownership cost; (3) measure adequacies of funding for the facility management annual budget; (4) determine if the operating funds received are spent in a manner that supports desired outcomes; (5) evaluate the quality of investments in existing buildings, infrastructure, and academic programs; and (6) determine if the institution is developing a staff that can sustain excellence. Some new features for the 2007-2008 report are (1) executive presentation, (2) detail report features and (3) cohort group reports.

Participation in the FPI survey is continuing to grow with the creation of cohort groups. The University of North Carolina system was the pilot with 13 institutions. The Georgia State system has formed a cohort group comprising 36 institutions. Of these 36 campuses, 10 new institutions have joined APPA. A third group is the California State University system with 23 campuses. Nearly 200 institutions from MHEC (Midwestern Higher Education Compact)

participated in an abbreviated FPI energy survey. With the combination of additional cohort groups and the MHEC participation, the FPI survey should show significant improvement in the number of participants.

For the past three years, a team of our peers has embarked on one of the most comprehensive and ambitious initiatives ever undertaken by APPA. Their task is to update the 12-year-old Body of Knowledge, or as you may know it, the four volume set of the *Facilities Management* manual. The new resource will be a digital body of knowledge and will be made available in a searchable Web-based format. This new work will include tables, pictures, embedded Internet links, streaming video, and audio files. Maggie Kinnaman is heading up the BOK project as Editor-in-Chief, and there are four Content Coordinators responsible for the four core competency areas:

- Jack Hug – General Administration and Management
- Gary Reynolds – Operations and Maintenance
- Darryl Boyce – Energy, Utilities, and Environmental Stewardship
- Bill Daigneau – Planning, Design, and Construction

Additionally, there are over 60 authors who are busy rewriting the body of knowledge for a specific content area. There is also an editorial board responsible for the oversight of the entire project.

CFaR has five white papers in process for APPA-sponsored research. They are:

- Decaying American Campus/Foundation to Uphold update;
- What Carbon Reduction Strategies also have the Greatest Chance for Achieving the Lowest TCO;
- Mine the LEED Points and Determine the Best Outcome for Higher Education;
- Total Cost of Ownership Research Project #2;
- Comparing and Contrasting the Various Types of Sustainability Tools Used to Rate Buildings.

There are two student research teams that will present their research findings at APPA 2009 in Vancouver. Their research explores various options of temporary cost-cutting measures that can be utilized by facilities staff and managers. Advancing these research projects or other initiatives will help to further secure APPA's place as the "go to" association for facilities professionals.

APPA's website has a more robust search engine, and is another valuable member benefit. A Web subcommittee chaired by Jeri King is exploring further enhancements to



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the website. One charge of this subcommittee is to examine how the four core landing pages can more clearly link to its sub-sites. Norm Young is the chair of the marketing/communications subcommittee. Its charge is to help increase marketing efforts surrounding APPA's products and services. *Inside APPA*, our biweekly electronic newsletter, continues to keep us abreast on APPA and regional events along with cutting-edge news items and publications. APPA has just published one new monograph, *Facilities Management Shared Services: The Balance Between In-House Services and Outsourcing*, authored by Jeffrey L. Campbell. Due out later this summer is a publication entitled *Strategic Capital Development* by Harvey H. Kaiser and Eva Klein.

A special note of thanks is to be given to the Information and Research Committee, APPA staff and the business partners supporting the committee: Norm Young, ERAPPA; Mike Sherrell, SRAPPA; Jeri Ripley King, MAPPA; Greg Weins, RMA; Open, CAPP; Richard Storlie, PCAPP; Maggie Kinnaman, At-Large; Darryl Boyce, At-Large; and Steve Glazner, APPA staff liaison to the committee. A special expression of gratitude to APPA staff supporting the I&R committee: Christina Hills, Leslie Young, and Anita Dosik. ■

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# VICE PRESIDENT FOR PROFESSIONAL AFFAIRS



By Kevin Folsom

**M**y second year as the Vice President for Professional Affairs has been busier than the first year. But it was no less a privilege, meaningful, and enjoyable. I can't say enough about the integrity and work ethic of the APPA staff, Board, and committee mem-

bers. Each year that goes by I am amazed at all that gets done!

Unfortunately, due to the economic downturn, my institution could no longer support my elected office activity, so I had to decline a second-term of nomination. If all goes my way, I will build my support back up and return for another nomination in the future.

But back on a happy note, you have an excellent new Vice President for Professional Affairs, David Cain, taking office this July at APPA 2009 in Vancouver! David has been involved with Professional Affairs for years and has a very keen understanding of all the needs.

Following are some items that I would like to report progress on over the last year:

## THE CODE ADVOCACY TASK FORCE (CATF) INITIATIVES:

- ANSI is putting the APPA webpage codes portal together for our members to buy codes at a discount.
- CATF member David Handwork has been seated on the ASHRAE 90.1 committee as APPA's representative.
- The task force has written a press release regarding our intentions to create a jointly developed APPA/NFPA/ANSI educational facilities standard. This will be featured in the APPA *Facilities Manager* magazine as well as many other publications.

## INSTITUTIONAL AWARDS

- Award for Excellence site visits were made to follow-up on qualified submissions from Philadelphia University, University of North Florida, and the University of West Georgia.
- Effective & Innovative Practices Awards will go to University of North Texas (Revised Small Renovation Delivery Process), University of Texas/Austin (Employee Recognition SITES Award), Valparaiso University (Natural Gas and Medium Voltage Distribution System), Weber State University (Safety Training Board Game), and Western Michigan University (In-House Capital Asset Documentation Program with GIS).

## INDIVIDUAL AWARDS

- Pacesetter Awards will go to Scott Burns, Ruthann Manlet, David Millay, and John Wong.
- Meritorious Awards will go to Bob Carter, Bob Hascall, and Ted Weidner.
- Fellow Award will go to Alan Bigger.

*We learned that the criteria for this award is not meeting its intended purpose. As a result, we will revise the criteria to appropriately recognize major contributors to APPA programs in lieu of the required program attendance/completion.*

**APPA's credentialing program** has shown significant growth since the early stages of preliminary planning in 2006. This exciting program has begun to prove how beneficial such a vehicle is to the APPA membership in validating their knowledge and experience.

The accomplishments in 2008-09 were:

- Offered eight Education Facilities Professional (EFP®) preparatory courses and exams
- A total of 56 individuals to date have been granted the Education Facilities Professional (EFP®) credentials as a result of successful completion of the exam
- The October 2008 webinar resulted in 300+ attendees
- The EFP® prep course and exam is now available for regions to offer, and the exam will be available Fall 2009
- An exam day at numerous sites throughout the U.S. took place on 2/28/09
- Established the CEFP study guide (12/15/08) and offered the first exam (2009 Winter Institute)

The plans for 2009-2010 are as follows:

- Engage the regional stakeholders to begin utilizing this fully operational service. The program is ready for delivery!
  - Take the exams
  - Get the word out
  - Offer regional scholarships
  - Offer to host/proctor

**The APPA Facilities Management Evaluation Program (FMEP)** Guideline was reviewed by an Ad Hoc Committee and subsequently by the Professional Affairs Committee. All the information is being reviewed and will be combined into a newly updated guide to be released by the 2009-2010 Fall/Winter. ■



# EXECUTIVE VICE PRESIDENT'S REPORT



By E. Lander Medlin

**T**hese are uncertain economic times for all sectors of the economy including education – locally, nationally, and globally. And, although public perception of the value of a college education remains strong, the global economic downturn has eclipsed all other factors contributing more sig-

nificantly than ever to the funding challenges we all face.

APPA is no different. Certainly, the impact of these economic challenges on your budgets and your ability to travel is even more severe than we could have imagined at the outset. For example, participation in educational programs is down between 40 to 50 percent as is the case for other association colleagues across the industry. Even our diverse portfolio of programs, products, and services cannot make up the difference, at least not financially thus far. Therefore, we must report a significant year-end deficit of \$510,588. Unfortunately, we could not mitigate the revenue and expense shortfalls we incurred, first from the APPA 2008 conference and then from our other educational programs in light of the financial crisis that hit us all in September 2008.

**It is worthy to note that we successfully completed our commitment to the investment in our 7 Key Strategies, which was accomplished in just three short years.**

Certainly, cash outlays for the development and execution of the certification program were significant, yet, development of both credentials is complete and we should begin seeing a return on our investment. It is worthy to note that we successfully completed our commitment to the investment in our 7 Key Strategies, which was accomplished in just three short years. In the meantime, our operating reserves fund has been reduced to \$245,000 reflective of our need to support the final development costs of the 7 Key Strategies and to service this untimely “rainy day” situation

this year. On a brighter note, we do own our headquarters building outright, valued at \$2.3 million.

Although the year remains bleak, we will most definitely work tirelessly to meet these challenges head-on. Fortunately, engagement in the work of improving the profession remains high and productive. This is a measure of the commitment to the profession by so many of you and your colleagues. We are blessed to have this support at this time. As such, APPA remains the “association of choice” supporting educational facilities professionals with a myriad of professional career development and leadership growth opportunities that are positioning us and YOU for the future.

Under the excellent leadership of President Bill Elvey, we have completed the five-year strategic plan to effectively implement the 7 Key Strategies. These 7 Key Strategies are:

- Develop and execute a “branding” initiative
- Develop and implement an enhanced website to become the “go to” resource for facilities questions
- Expand research to build credibility and visibility by senior institutional officers
- Engage in collaborative partnerships and relationship-building
- Engage young facilities professionals in the organization
- Provide targeted, cutting-edge educational programs
- Establish credible and valued credentialing programs for individuals and institutions

As we complete the 7 Key Strategies, the clarity of focus and direction has been sharpened and crystallized in ways that increase value to our members in both tangible and intangible ways. Our programs, products, and services have been transformed into a professional development career continuum that is unparalleled in the industry. Our role to elevate educational facilities professionals into influential leaders in education is taking shape. Further, implementation of these 7 Key Strategies has been critical to delivering the desired outcomes of Competency, Collaboration, and Credibility for our members. These desired outcomes – the 3 Cs – remain a consistent key message and laudable goal for the association.

## COMPETENCY

The guidelines and standards established by your colleagues over the past several years remain invaluable tools for resource allocation and strategic planning. If your resource library does not include the Web-based *2007-08 Facilities Performance Indicators* (FPI) and dashboards and our newest books *The Green Campus* and the significantly revised edition



# EXECUTIVE VICE PRESIDENT'S REPORT

of the *Environmental Compliance Assistance Guide* (published in collaboration with the Campus Safety Health and Environmental Management Association) along with *Buildings. . . The Gifts That Keep On Taking: A Framework for Integrated Decision-Making* and *Leadership in Educational Facilities Administration, Making the Business Case for Renewable Energy* (published in collaboration with NACUBO and SCUP), and *Stewardship & Accountability in Campus Planning, Design & Construction*, you should quickly ensure that it does.

Further, it is noteworthy that our FPI data, ratios, and benchmarks are being used more widely than ever before. Several large higher education systems have established cohort groups and are taking advantage of APPA's FPI tools and training to make their data collection and benchmarking efforts extremely meaningful and valuable. Our international strategic alliance partners are exploring a similar approach for their Web-based benchmarking needs. Don't hesitate to contact us for more information on this invaluable resource. And, did I mention, these tools and reports are available free to

member institutions who participate in the data collection survey phase? An incredibly invaluable member benefit!

The availability and flow of relevant information regularly occurs via APPA's bimonthly magazine, *Facilities Manager*; *Inside APPA*, our biweekly electronic newsletter; our website, [www.appa.org](http://www.appa.org); and the APPAinfo discussion list that boasts over 1,000 subscribers. Our latest version of the APPA website represents our updated, transformational brand identity. The site is indeed becoming the "go to" resource for educational facilities questions worldwide.

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

Over a dozen research projects have been completed to date. Completion of APPA's two major sponsored research

projects – *Buildings. . . The Gifts That Keep On Taking: A Framework for Integrated Decision Making*, which demonstrates the importance of integrated resource planning and management for both capital development and renewal/maintenance of all facilities; and *The Impact of Facilities on Student Recruitment and Retention* – significantly contribute to the body of knowledge for the facilities profession and ultimately impact decision making by senior institutional officers. Please make sure you get more detailed information from APPA's website on these two projects.

Finally, as part of our strategy to expand research, APPA, with sponsorship from Jacobs, delivered its third annual Thought Leaders Symposium for 2008. In essence, a group of key higher education stakeholders consisting of chancel-

lors, presidents, regents, business officers, facilities professionals, and representatives from the business community are assembled annually and engage in a day-long discussion of several drivers of change expected to shape the future of higher education and their impact on facilities.

**As part of our strategy to expand research, APPA delivered its third annual Thought Leaders Symposium for 2008.**

The specific trends in higher education and the top critical facilities issues for fiscal years 2006 and 2007 are published as monographs and have been disseminated to facilities professionals and senior institutional officers. The third Thought Leaders Symposium focused on the criticality of workforce demographics and accountability in higher education, and the impact of institutional resistance to change on both these major trends. Visit our website for your free PDF downloadable copy.

I am also pleased to report that APPA (through the generous sponsorship of Affiliated Engineers, Inc., AEI) launched a second Thought Leaders workshop focused on delivering a "Practical Guide for Reducing the Campus Carbon Footprint." We delivered this monograph to the community last fall. We held two day-long workshops at the AASHE and Smart & Sustainable Campuses conferences using the report's content as the curriculum.

This is just the type of research that will brand APPA as the "go to" resource for educational facilities questions. And, it is through these research findings and thought-provoking symposia that we will increase the awareness of the facilities



profession with senior institutional officers and enhance the credibility of the educational facilities professional.

The content and appeal of APPA's vast array of educational programs (Institute for Facilities Management, Leadership Academy, and the Supervisor's Toolkit) provide members with the professional career development and personal growth needed to compete and collaborate effectively in today's environment. These educational programs are truly cutting-edge. And, to meet your continuing education/ licensure requirements, look for the CEUs and PDHs available for many of the courses offered at these educational programs. In addition, we have established a catalog of webinars being regularly delivered to continue support of your professional development needs even though you cannot travel. Take advantage of these opportunities as they are available. If the timing is inconvenient, we have archived each of them for access at your time and place of choice. If you are a business partner, take advantage of the opportunity to sponsor one of these webinars. The visibility and exposure is unbeatable.

Of particular note is the complete reformulation of APPA's annual conference (now simply called "APPA 200X"). We have featured best-of-breed speakers who will focus on the future solutions to our most pressing issues. The enhanced framework consists of a daily opening plenary session, followed by panel discussions and breakout sessions designed to provide practical tools and technologies for current and future projects, to bolster your skills, and to prepare your organization for the next generation of facilities management practices. This approach strengthens this offering in a number of ways and ensures differentiation from regional and state or chapter meetings.

Also, we again delivered a distinct and successful program strictly for senior facilities officers called the Senior Facility Officers Summit this past April in Asheville, North Carolina. These two educational programs—along with our Institute for Facilities Management (offered twice yearly in September and January), the Leadership Academy (offered each April), and Supervisor's Toolkit (offered at your time and place of choice) – will continue to serve the continuing professional development needs of supervisors, mid-level managers, directors, and senior facilities officers. These activities are considered essential by the volunteer leadership to provide for a continuum of professional development career opportunities for the educational facilities professional.

To add to this continuum of professional development

career opportunities and to complement our competency-based programs and services, APPA's Board of Directors approved the development and execution of a certification program comprising two credentials. The first credential is a knowledge-based credential called the EFP (Educational Facilities Professional) targeted to the *younger*, or less experienced educational facilities professional. A preparatory course has been delivered numerous times this year and in conjunction with our major educational offerings. As a result, several dozen individuals have now achieved the status of EFP.

The second credential is a full certification for the more *experienced* educational facilities professional (CEFP – Certified Educational Facilities Professional) incorporating both the body of knowledge of educational facilities management and successful demonstration that knowledge has been applied at the institutional level. The CEFP designation launched in September 2008, and the first exam was available in January 2009 at the Institute for Facilities Management.

Both these credentials are essential for the future engagement of our young facilities professionals in APPA and the educational workplace and to increase the credibility of the facilities profession at educational institutions. And, now you can take the preparatory course through an online webinar delivery and sit for the exam at a 'drive-in' location. Indeed, we are now offering the EFP exam at multiple locations four times a year called Exam Day. Look for the next offering through our *Inside APPA* newsletter or visit the certification section of the APPA website.

#### COLLABORATION

Strategic collaboration and partnering continues to occur on a number of fronts and increases the depth and breadth of research and information and ultimately the value you receive as part of your membership. APPA's work with NACUBO, SCUP, and the EPA through the Smart & Sustainable Campuses Conference with HEASC (Higher Education Associations Sustainability Consortium) and with business partners such as AEI, are expanding the collective knowledge and network for institutional sustainability programs. It is just these relationships that helped us develop the program content for delivery of a special program track on sustainability at the January 2009 Institute for Facilities Management. If you missed it, don't worry – we are offering a similar track at the September 2009 Institute for Facilities Management in Hilton Head.



The joint ACUHO-I/APPA Housing Facilities Conference remains a successful program offering for both the campus housing and facilities professional. This program is offered annually each fall.

These strategic alliances and partnerships help APPA leverage its resources to provide cost-effective, focused research, information, and educational programming, and at the same time, ensure an increased information flow to our members and provide opportunities for more meaningful engagement by young facilities professionals. Visit our website for more details about our combined offerings to take advantage of these relationships.

#### CREDIBILITY

Environmental issues and compliance concerns remain an important part of our public policy agenda. APPA remains focused on reforming the EPA hazardous materials regulations, establishing better environmental performance measures and systems, and forging ahead to create and maintain a substantive dialogue with the EPA. We have just begun work with the Department of Energy (DOE) to establish a College & University Energy Alliance to improve energy efficiency that is also environmentally responsible. Visit our website for updates on progress and utilize the associated Web-based education compliance assistance center for your information needs (<http://www.educationcompliance.org>).

The explosion of regulatory issues and code compliance drove the establishment of a Code Advocacy Task Force (CATF) by the APPA Board last year. The task force is presently aligned under the duties and responsibilities of the Vice President for Professional Affairs. CATF is close to establishing a "standards portal" for our members. The group has already advocated a variety of positions with NFPA and ASHRAE successfully with the impact of avoiding additional costs and/or saving educational institutions thousands of dollars. Look for more information on these important developments during the coming year through the APPA website and in the Code Talkers column of *Facilities Manager* magazine.

This year we added a section to the website to help senior facilities officers navigate the American Recovery & Reinvestment Act (ARRA – aka "The Stimulus Package"). There is still a fair amount of relevant information resident on the website and it's only a few clicks away. Take advantage of these resources.

The clarity of APPA's brand purpose "to transform the educational facilities professionals into influential leaders creating supportive and inviting learning environments" is integral to all we do. And, APPA's role in increasing the awareness of the facilities profession with senior institutional officers will remain a strategic driving force on behalf of the education facilities profession. Our brand identity in education is reflective of this purpose and role and its ongoing attainment. Our commitment to programs, products, and services that improve the facilities professional's competency remains unparalleled in the field of educational facilities. By coupling this increased competency with our collaborative strengths, the credibility of our members and the profession is further enhanced.

APPA's competitive advantage in this rapidly changing and challenging world stems from your active engagement across our professional development career continuum. Here you will find programs, products, and services of great value as you wisely choose membership in this association. The decisions you face and the priorities you make must be strategic. We are pleased to be part of your strategy for your individual professional development, the training and development of your organization's staff, and improvement of your institution.

We appreciate the value you place on your membership in APPA and in our professional development programs, targeted publications, and meaningful recognition and awards programs. Our efforts to focus on the grassroots of this organization will continue in the coming year to ensure that your needs and expectations are being heard and met. The 7 Key Strategies will remain essential to the focus and direction of the profession and the association well into the future.

Through the vast array of educational offerings, print and electronic information, research, publications, and this rich network of professionals, APPA can help you gain that competitive edge and enhance your professional image.

Certainly, the continued challenges we face as an association, as educational facilities professionals, and as an industry sector will require our best collective and collaborative efforts. Your contributions will be key in helping to shape the future of education. APPA's contributions will be key as a significant voice on strategic institutional issues for the educational facilities profession. ■





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