

EACH AND SEP/OCT 2010 Manager

INTRODUCING Darrel Meyer

2010-11 APPA PRESIDENT

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Arkansas State and UNLV Win Award for Excellence

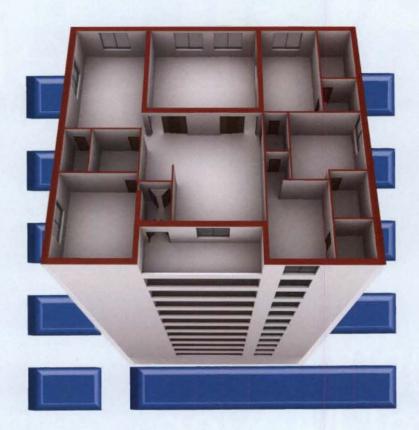
2010 E&I Practices Award Winners

Highlights from Boston

APPA's 2010 Annual Report

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INTRODUCING Darrel Meyer

2010-11 APPA PRESIDENT

2010 AWARD Excellence

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A Prof	file c	f Presi	ident	Darrel	Meyer

By Alan Dessoff

With 20 years of hands-on facilities management experience at MCC as well as learning and leadership experience at APPA, and with a record of significant achievements at both, Meyer has assumed the ultimate leadership position as APPA's President for 2010-11.

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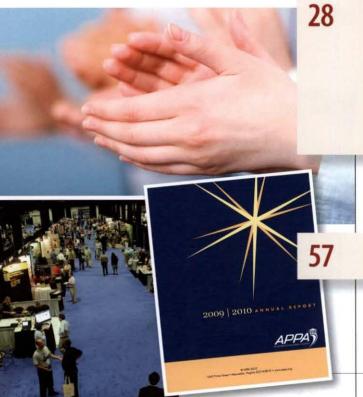
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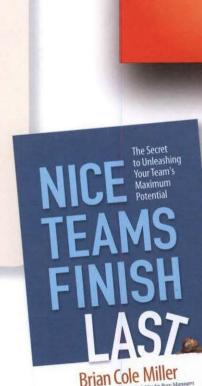
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2009-10 APPA Annual Report

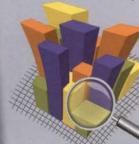


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Performance Measurement Protoc for Commercial Buildings



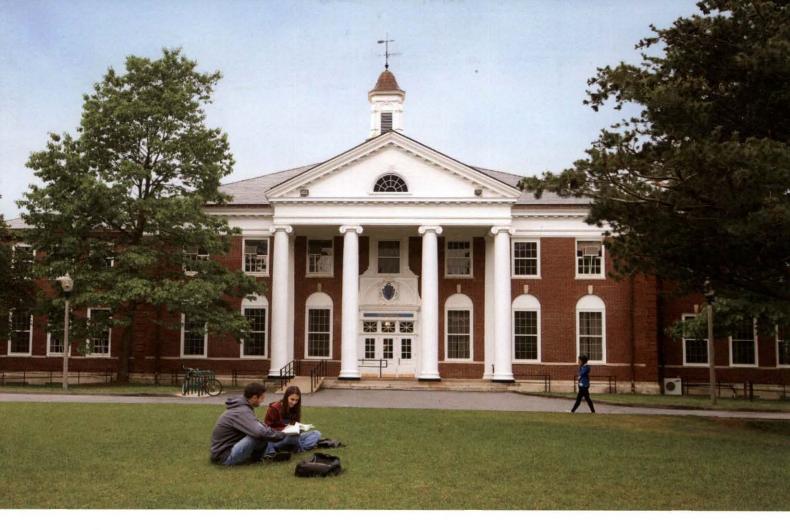
Brian Cole Miller



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\$40 million invested; \$55.5 million saved.

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It is an annual pleasure of mine to learn the name of the winner of the Rex Dillow Award for Outstanding Article. Those eligible for the award are full-time employees of an APPA member institution who publish an article in Facilities Manager. The award is selected by APPA's Information and Research Committee based on a comprehensive rating scale.



The 2010 Rex Dillow Award recipient is Joe Whitefield of Middle Tennessee State University, for his article "Deferred Capital Renewal as a Spoiler for

Campus Programs," which was published in the January/February 2010 issue. This was Joe's first article for Facilities Manager, and he has been active in APPA in many activities, including participation in several Thought Leaders symposia and as a panelist for the closing plenary session on Inventing Your Future at the APPA 2010 conference in Boston. Congratulations to Joe!

The 2009-10 Facilities Performance Indicators (FPI) survey is now open for



data collection. We invite all educational institutions [colleges, universities, K-12, preparatory schools,

libraries, museums, etc.] to participate in the 2009-10 FPI survey.

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. More than 450 learning institutions are now realizing the benefits of APPA's FPI performance measurement services.

The 2009-10 FPI survey will close in early December 2010, but we hope that all of you will begin inputting your data right away. Please note that you will need to complete the survey Registration module before you will have access to the other

survey modules. The survey access instructions can be found on our FPI home page at www.appa.org/research/fpi/index.cfm.

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.

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.

Central

Sep 25-29, Lincoln, NE

Pacific Coast

Sep 26-29, Seattle, WA

Midwest

Oct 2-6, Moline, IL

Southeastern

Oct 3-5, Point Clear, AL

Eastern

Oct 3-6, Pittsburgh, PA

Rocky Mountain

Oct 18-20, Coeur d'Alene, ID ③

Coming in Nov/Dec 2010

- Aligning Capital Planning & Construction with FM
- What a Contractor Expects from the Owner
- · How BIM Fits Into the FM Toolbox

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www.touch3.com

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www.appa.org/facilitiesmanager

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

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

About APPA

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

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facilities **Industry News & Events**



If you didn't make it to APPA 2010 you missed the profession's major go-to event for career enrichment and advancement, a chance to ask questions of the thought leaders in educational facilities community, and MUCH more. Plan now to attend APPA 2011 to be held July 16-18 in Atlanta, Georgia. Work APPA 2011 into your professional development and travel



SAVE THE DATE JULY 16-18, 2011 APPA 2011 ATLANTA, GA

APPA 2011 CALL FOR PAPERS

budgets. Registration will open

December 2010.

Program Submission Deadline: October 29, 2010

We invite you to submit a paper for next year's conference in Atlanta, Georgia. The program concepts for the 2011 conference programming will focus on:

- Economy
- Sustainability
- Leadership
- Technology

Presentations will be considered for review based on the following submission requirements:

- · Program abstract to include title;
- Program abstract in a format of 5-7 sentence description;

- 3 learning outcomes;
- Bios for all possible presenters;
- Complete contact information to include full name, title, institution or company, phone and e-mail address; and
- Business partner presentations should partner with an educational entity.

Submissions can be made by e-mail to Suzanne Healy, director of professional development, at suzanne@appa.org. Submissions will not be accepted if the above items are not included.

For additional questions regarding submissions for APPA 2011, contact us at 703-542-3833.

STRATEGIC CAPITAL DEVELOPMENT: THE NEW MODEL FOR CAMPUS INVESTMENT

APPA's newest book, Strategic Capital Development: The New Model for Campus Investment, by Harvey H. Kaiser and Eva Klein, presents a bold approach for planning capital investments from a strategic and long-range perspective. This resource helps organizations improve capital planning

and decision making. And it defines the stewardship principles needed to create and sustain a built environment that is responsive to institutional strategies and functions, remains attractive to faculty and students, and optimizes resources.

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Developed in partnership with Hunter Consulting and Training, the new Grounds Staffing Guidelines/GroundsOpsStaff Package is powerful software with a built-in set of tools for improving your groundskeeping efficiency. These include the five APPA Levels of Attention, the six standard grounds areas matrices, worksheets for grounds inventory data in multiple units of measure, and much more. GroundsOpsStaff performs all

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ACUHO-I/APPA HOUSING FACILITIES CONFERENCE

October 12-15, 2010 The Westin Charlotte Charlotte, North Carolina

Presented in partnership with APPA for nine years, this annual conference explores topics related to housing facilities including best practices for maintaining, building, or renovating college and university campus housing facilities.

For more information, or to register, please visit http://www.acuho-i.org/Default.aspx? tabid=807. Or contact Suzanne Healy, director of professional development, at suzanne@appa.org.

APPA CERTIFICATION

Earn the Educational Facilities Professional Accreditation

The Educational Facilities Professional Credential (EFP) helps you get credit—and accredited—for all your hard work and establishes a standard for professional practice in the field of education facilities management. It shows that you know the standards and best practices, ideas, and principles that contribute to creative and sound decisions and demonstrates you have the ability to perform research-backed stewardship. The exam for the EFP Credential covers APPA's four core competency areas for facilities professionals:

- · General Administration and Management
- Operations and Maintenance
- · Energy and Utilities
- · Planning, Design, and Construction

To obtain more info, visit http://certification.appa.org/ or contact Suzanne Healy, director of professional development, at suzanne@appa.org.

EVENIS

APPA EVENTS

Sep 24-27 APPA's Supervisor's Toolkit, Lincoln, NE
Sep 24-27 Track 1 of APPA's Leadership Academy: Individual
Effectiveness Skills, Lincoln, NE

Sep 25-28 APPA's Supervisor's Toolkit, Seattle, WA

Sep 25-29 CAPPA Regional Meeting, Lincoln, NE

Sep 26-29 PCAPPA Regional Meeting, Seattle, WA

Oct 1-5 APPA's Supervisor's Toolkit, Pittsburgh, PA

Oct 2-6 MAPPA Regional Meeting, Moline, IL of the Quad Cities

Oct 3-5 SRAPPA Regional Meeting, Point Clear, AL

Oct 3-6 ERAPPA Regional Conference, Pittsburgh, PA

Oct 12-15 ACUHO-I/APPA Housing Facilities

Conference, Charlotte, NC

Oct 16-20 APPA's Supervisor's Toolkit, Coeur d'Alene, ID

Oct 18-20 RMA Regional Conference, Coeur d'Alene, ID

Nov 12 Credentialing National Exam Day, Various Locations

Jan 9-13 Institute for Facilities Management, Orlando, FL

Jan 9-13 Leadership Academy Tracks 2 & 4, Orlando, FL

OTHER EVENTS

Sep 28-30 Labs 21 210 Annual Conference, Albuquerque, NM

Oct 10-12 AASHE Annual Conference, Denver, CO

Oct 12-15 2010 EDUCAUSE Annual Conference, Angheim, CA

Oct 20 Campus Sustainability Day 8 Webcast

Oct 26-27 Human Error Prevention, San Antonio, TX

Oct 27-30 Green Industry Expo, Louisville, KY

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

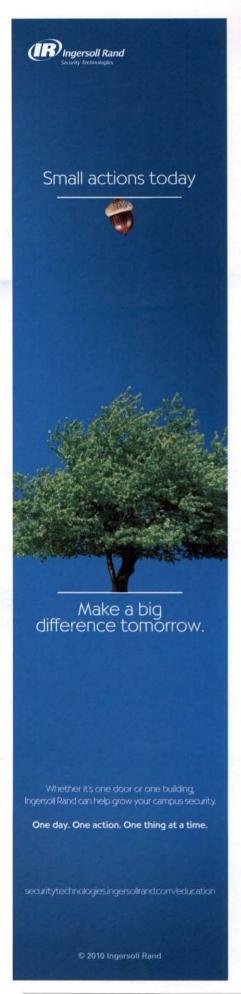
2010 THOUGHT LEADERS – AVAILABLE SOON!

APPA developed the Thought Leaders Series to promote dedicated discussions on the future of higher education and the impact of that future on educational facilities.

The annual Thought Leaders Symposium convenes representatives of colleges and universities from across the United States and Canada alongside association leaders and industry consultants.

The 2010 Thought Leaders report will be available soon through the APPA bookstore.

Many thanks to UGL Unicco for their sponsorship of the 2010 Thought Leaders Symposium.



Power to the Network

By John Bernhards

ere are three steps you can take to fully utilize the "APPA Network" and get full value from your APPA membership now - and for years to come.

NETWORK THROUGHOUT THE YEAR

APPA 2010 was one of the most well attended APPA annual conferences in ten years. Despite a challenging economy, APPA members came out in full to Boston, and the energy and excitement was clearly evident throughout the Seaport Hotel's conference

attending, the most common response was this: "In addition to the session content. I am here because I need to NETWORK with my colleagues and share ideas."

Now, more than ever, members are seeking out one another to dialogue and share information. Certainly, the APPA conference and other program events such as the Institute, the Leadership Academy, and the Supervisor's Toolkit are all perfect settings for professional networking. But as a member, are you also taking advantage

DON'T MAKE YOUR NETWORK EXPERIENCE JUST AN "ANNUAL" EVENT — CONNECT AS MUCH AS YOU WANT AND AS OFTEN AS YOU CAN THROUGHOUT THE YEAR, AND PUT THE POWER OF THE APPA NETWORK BEHIND YOU.

center from July 14-16. The conference session speakers represented a diversity of ideas and perspectives, and the speaker rostrum included not only educational facilities leaders, but also college presidents, a university system chancellor, the media, college communications directors, consulting companies, and others from throughout the education community. Sustainability, campus security, the economy, succession planning and the future of the profession provided the perfect blend of subject matter for this year's conference program.

During informal, one-on-one conversations I had with many of the 500+ attendees, the message was quite clear: when asked for their chief reason for

of the peer-to-peer networking available at home and the office? Here are some suggestions for you: Take advantage of the APPAinfo Discussion List, found at www.appa.org/discussionlists. Over 1,050 of your peers are actively enrolled in this APPA service. Throw any question that comes to mind to the discussion list, and you will quickly receive thoughtful responses from other members who will share their experiences and offer their professional recommendation.

Here is yet another opportunity: make full use of the APPA online Membership Directory. Use the directory to connect with colleagues and peers from other member institutions, who can share suggestions with you throughout











B.

Any of the above.

Campus security has more than one right answer.

You can't go wrong with the AD-Series - the first of many flexible products from Schlage." Customize each opening with networking options, credential readers and more, and then upgrade your lock as needs change in the future. Visit schlage.com/ad-series to make a difference on your campus this year. Whether it's one door or one building, the AD-Series is the right choice for a more flexible future.

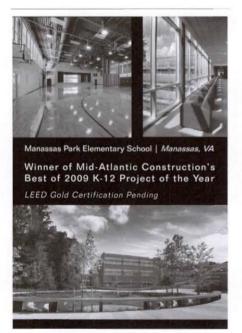




the year and act as a sounding board for your own ideas. In short, don't make your network experience just an "annual" event - connect as much as you want and as often as you can throughout the year, and put the power of the APPA network behind you.

FULLY COMMUNICATE THE VALUE OF MEMBERSHIP TO YOUR CAMPUS **ADMINISTRATORS**

During APPA 2010, APPA President Darrel Meyer conducted a meeting of the newly established "community college engagement group" where he gathered over 20 community college representatives attending the conference-many for the very first time. The key purpose of the meeting: identify ways that APPA can increase its value to community colleges and enhance community college participation and membership. During



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TO SUPPORT YOU, THE APPA WEBSITE WILL FEATURE TESTIMONIALS FROM MEMBERS SHARING THE VALUE AND DIRECT RETURN THAT THEIR CAMPUS IS RECEIVING FROM APPA.

the engagement group meeting, Darrel shared that he takes every available opportunity to inform his campus administration officials of the value he and his institution receives from his participation within APPA. He is quick to identify new ideas he has gained from APPA, particularly those that he has implemented that have produced sizable cost savings for his campus.

The majority of APPA member institutions pay less than \$1,500 a year for membership dues, a modest price to pay when you consider the return on investment. Many APPA members attribute such savings to APPA's services, educational programs, and networking opportunities. Many can cite savings in the hundreds of thousands of dollars, just from one idea that resulted from their involvement within APPA.

Take a few minutes to share with your administration the direct return on investment that your campus, or others like it, are experiencing as a result

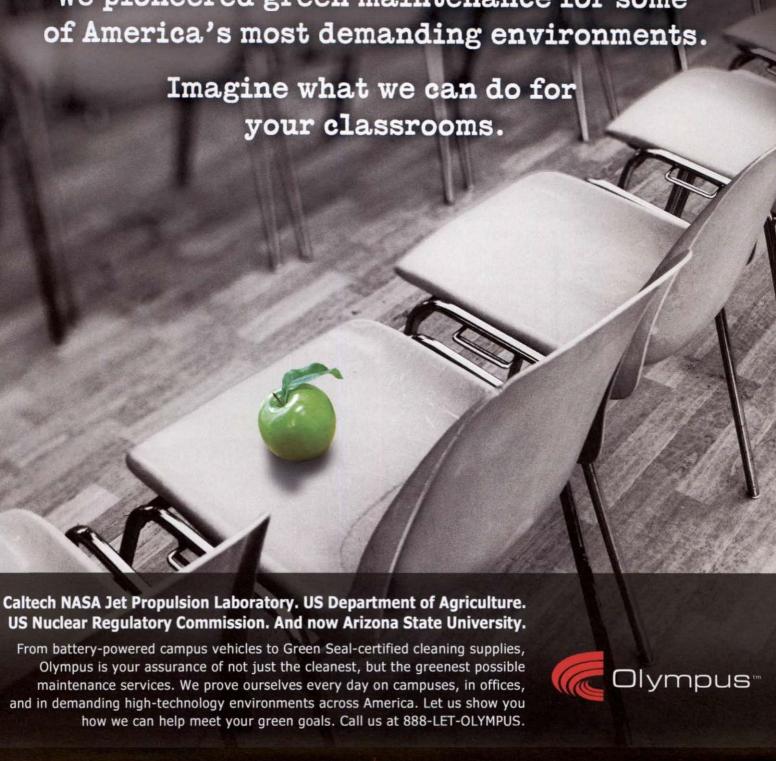
of APPA membership. To support you, the APPA website will feature testimonials from members sharing the value and direct return that their campus is receiving from APPA. These testimonials we be featured prominently throughout the APPA website. As they say, "A picture is worth a thousand words." I encourage you to share these testimonials with others when they are released. Once again, let the "power of your network" help you share the story and the value that is achieved only through APPA.

INTRODUCE APPA AND THE VALUE OF MEMBERSHIP TO THREE INSTITUTIONS LOCAL TO YOU

The greater and more engaged the membership, then the greater the value of the membership experience. The "power of networking" only magnifies itself as the membership grows. Take time this fall to connect with three of your peers in facilities management, whether they be from four-year or twoyear/community college institutions, private academies, K-12 public school districts, or public or private museums or city or county library systems. Remember that APPA represents the entire spectrum of educational facilities professionals.

Pick up the phone or drop an e-mail to those facility professionals local to you that are not yet members, and let them know about APPA and the benefits of membership. You don't have to go it alone: APPA's staff can help you identify nonmembers local to your area. Contact me at john@appa.org or APPA's membership and outreach manager, Santianna Stewart, at santianna@appa.org, and we'll assist you in this outreach. We look forward to hearing from you! 3

John Bernhards is APPA's associate vice president. He can be reached at john@appa.org. This is his first article for Facilities Manager.



The Nine Things You Should Be Destroying

By Andrew Kelleher

y now, most people have gotten the message about the need to shred important papers. The issue of identity and data theft is so widely discussed, and paper shredders are now so widely available and affordably priced, that it's hard to imagine anyone just throwing important documents into the trash. So, kudos to all of you responsible people who do the right things to protect yourselves and your businesses from information theft.

You've figured out paper, but what about other threats you might not be aware of? What about all those electronic records floating around your office? If you're not dealing with them, paper is the least of your worries.

As computers and other electronic devices become obsolete sooner and sooner due to new technology, disposal of sensitive information is of serious concern. Just one hard drive, CD, or DVD can contain thousands of files. When a digital file is "deleted" from a computer, the information actually remains on the hard drive, as do deleted e-mail messages and records of all online activity. These days it all can be recovered with sophisticated tools. This is worth remembering before donating old computers to a school or local charity, for example. In some cases, old computers are removed and resold by the vendor who installs the replacement computers.

Likewise, "dumpster divers" can obtain proprietary information from prototypes and off-spec batches of toys, clothing, and pharmaceuticals that are merely discarded instead of thoroughly destroyed.

The following chart lists some obvious and not-soobvious items that could cause significant problems if not disposed of properly. All of these items can be rendered harmless by one or more of five methods:

- Shredding Reducing items to small strips/particles.
- 2. Degaussing Using powerful magnets to permanently eliminate data from magnetic media.
- 3. Disintegration "Mechanical incineration" that continually cuts items into smaller and smaller pieces until they are unrecognizable and unreconstructible.



Computer parts and other metal waste end up as "e-scrap," some of which can be recycled. Powerful shredders reduce metal to strips (left) that can be run through a disintegrator and pulverized to tiny bits (right) for added security.



After passing through a disintegrator, computer hard drives end up as tiny bits of "e-scrap."

- Declassification Physically grinding the databearing surfaces from CDs and DVDs.
- 5. Crushing Destroying hard drives by subjecting them to extreme pressure from a conical steel punch or similar device.

What about cost? Ideally, the decision to purchase destruction equipment should not be based on cost, but on potential risk. For some businesses, the peace of mind that comes from knowing sensitive records will never leave their facilities intact makes the investment worthwhile. Even so, many companies simply cannot afford to purchase this equipment for the relatively few items they need to destroy. These businesses may choose to outsource such destruction.

Outsourcing can be affordable and safe when done properly. If you choose this option, be sure to do your homework to learn just how secure the destruction facility is. Here are some questions to ask:

- 1. How are materials transported to the destruction facility? Does the facility offer locked, trackable transport cases?
- 2. Does the facility require service contracts or monthly minimums?
- 3. Upon arrival at the facility, will your items be inventoried and stored in a locked area?
- 4. Are job applicants thoroughly screened? Is the facility monitored around the clock by security cameras?
- 5. What destruction methods will be used? The facility's equipment should make short work of computer hard drives (or even whole central processing units), CDs, DVDs, diskettes, microfilm, credit cards, ID badges, audio and video cassettes, circuit boards, PDAs (Palm Pilots and the like), cell phones, x-rays, flash media (digital camera "thumb drives," etc.), and key tape. Everything should end up as "e-

- scrap" tiny, unrecognizable fragments.
- 6. Has the facility's equipment been approved by the U.S. National Security Agency?
- 7. What proof will you have that items were actually destroyed? Would you be allowed to watch the destruction in person or via IP video camera?
- Will the destruction of your items be certified in writing?
- 9. What happens to destroyed waste? Is any of it recycled in accordance with pertinent regulations?
- 10. Is the facility bonded and insured?

If you don't like the answer to any of these questions, look for another facility.

Data security is an ongoing process, but by being aware of threats and understanding destruction options, you will be in a much better position to protect your institution and yourself.

Andrew Kelleher is president of Security Engineered Machinery (SEM), a supplier of document destruction equipment, based in Westboro, MA. He can be reached at info@semshred.com. This is his first article for Facilities Manager.

THE 9 THINGS YOU SHOULD BE DESTROYING

ITEM	THREAT	METHOD OF DESTRUCTION
1. COMPUTER HARD DISK DRIVES	Data Theft — Documents, Spreadsheets, Databases, etc.	Shredding, Crushing, Disintegration, or Degaussing
2. THUMB DRIVES/FLASH DRIVES/ MEMORY CARDS	Data Theft — Documents, Spreadsheets, Databases, etc.	Shredding or Disintegration
3. CELL PHONES/BLACKBERRIES & OTHER PDAS	Data Theft — Contact Lists, Call Logs, Images, etc.	Shredding, Crushing, or Disintegration
4. OPTICAL MEDIA — CDS/DVDS	Data Theft	Shredding, Disintegration, or Declassification
5. OTHER MAGNETIC MEDIA — FLOPPY DISKS, ZIP DISKS, COMPUTER BACKUP TAPES	Data Theft	Shredding, Disintegration, or Degaussing
6. EXPIRED INVENTORY, OFF-SPEC PRODUCTS, PROTOTYPES	Data Theft — Corporate Liability, Brand Degradation, Industrial Espionage	Disintegration
7. CREDIT CARDS/ID BADGES	I.D. Theft — Data on Magnetic Strip	Shredding (paper shredder okay for low volume) or Disintegration (high volume)
8. AUDIO, VIDEO & MICRO CASSETTES	Data Theft — Meeting Records, Sales Aids/ Training Materials	Disintegration or Degaussing
9. LASER PRINTERS & FAX MACHINES	Data Theft — Remnant Data on Drums & Internal Memory	Shredding or Disintegration

INVESTING IN THE FUTURE: A PROFILE OF

PRESIDENT DARREL MEYER



BY ALAN DESSOFF



hen Darrel Meyer was hired by Metropolitan Community College (MCC) in Kansas City, Missouri as facility services superintendent in 1990, he knew a lot about construction but little about facilities management. Meyer had spent the previous ten years with two construction companies. "I knew how to build buildings and manage people," he says, "but I really didn't have a great background in how to maintain and operate buildings."

So he joined APPA and began learning quickly what he needed to know to function effectively in his new job. "By plugging into the APPA system, I was able to attend seminars and network with other professionals. I would call people and ask, 'how do you do this?' and they would tell me how to do it. APPA is a vast resource," Meyer says.







Far left photo: Darrel & Jane Meyer with son Marc and his fiancee Jenna Mayers. Far right photo: Polly Pinney passes the Presidential gavel to Darrel Meyer at the APPA 2010 conference. All other photos are of Metropolitan Community College of Kansas City.

He grew comfortably into his job at MCC, where he was promoted to director of facility services, his present position, in 1998. He also grew comfortably in APPA, rising through a number of committee, task force, and leadership positions. A graduate of the APPA Institute for Facilities Management, he served at the state, regional and international levels and on APPA's Board of Directors and Executive Committee before becoming President-Elect last year. He received APPA's Pacesetter Award in 2005 and Meritorious Service Award in 2008.

Now, with 20 years of hands-on facilities management experience at MCC as well as learning and leadership experience at APPA, and with a record of significant achievements at both, he has assumed the ultimate leadership position in the profession as APPA's President for 2010-11.

A LOOK AT MCC

At Metropolitan Community College, Meyer directs facility services at five separate campuses across the Kansas City metropolitan area, with 2.1 million total gross square feet and 568 acres of grounds. The Physical Facilities and Public Safety Department currently includes about 200 full-time and part-time employees. Annual enrollment of 50,000 students includes about 412,000 college credit hours.

Meyer has been involved with almost every MCC building project since 1986, including the four years before he joined the institution, when he was working for J.E. Dunn Construction Company in Kansas City as project superintendent. Over the last ten years, he served as primary leader of a \$110 million capital improvement program for MCC, working with administration and faculty in the funding, planning, design, and construction of new educational facilities at the five separate campuses. He has planned and coordinated MCC district maintenance and repair projects with an annual budget of approximately \$3 million and developed physical facility annual budgets within guidelines and managed an annual operating budget of \$13 million.

Among other achievements, he developed and implemented a public safety reorganization plan for the college that included assuming responsibility for overseeing that department. He also initiated and implemented an energy management program that reduced utility costs more than \$4.4 million over ten years while improving the physical environment for education.

Meyer describes his management style at MCC as "firm," but he also is accessible to his staff. "I am effective with the staff largely because I communicate openly with them," he says. He and other administrative services directors are "teammates, jointly focused on the success of MCC," he adds. "Throughout my career, I have believed that customer satisfaction is paramount, and I strive at all times to achieve that end. My ability to analyze a situation, define problems, and reach a reasonable, thought-out solution to act upon has helped me develop a reputation for caring that the job is done well."

"He is an impeccably detailed person. He has a lot to oversee and consistently does a great job of it," asserts Dr. Jacqueline Snyder, who retired in June after five years as MCC's chancellor. "He has totally transformed the appearance of the institution. The attention to detail and the appearance of our campuses have impressed people who have been on the campuses," she says.

Snyder also cites Meyer's interest in energy efficiency. "He has led our green energy program. I found him a delight to work with and really willing to do what a customer asks," she says.

"He is a terrific guy all around. He takes great pride in what he does and leads by example. He treats people the way you'd want to be treated," says Allan Tunis, a former MCC vice chancellor for administrative services.

"I'm very proud of what Darrel has been able to do for us. He's always bringing us new ideas and suggesting the long-

> term benefits of considering different solutions," declares MCC Board President David Disney. While he is speaking about Meyer from his MCC perspective, they have known

THROUGHOUT MY CAREER, I HAVE BELIEVED THAT CUSTOMER SATISFACTION IS PARAMOUNT, AND I STRIVE AT ALL TIMES TO ACHIEVE THAT END..."









each other since Meyer was at J.E. Dunn Construction, where Disney now is senior vice president, and they worked together on MCC building projects. "Having a long-term relationship like that with these facilities and responsible now for managing them, he has a lot of personal pride in them," Disney says.

Meyer says he is proud of his impact on the growth and development of facilities for MCC, including construction or renovation of more than 40 buildings. He links that to one of the reasons he is excited to become APPA's President. "It's an opportunity to leverage visibility for MCC and also for community colleges in general, which are undergoing incredible growth," he explains. In the past year alone, he says, many community colleges have grown more than 20 percent, driven largely by

ARAMARK Uniform Services

economic factors, as students unable to afford four-year colleges enroll in two-year institutions instead, along with individuals seeking new training after being laid off from their jobs.

The economy also is having a broader impact on facilities management in general, Meyer says. "Like everybody else, facilities professionals are being asked to do more with less as our institutional budgets are shrinking, and we are being asked to come up with a large share of the solutions for these budget reductions," he declares. "You either have to reduce expenditures or increase revenues, and on the facilities side, we can't increase revenues."

Instead, in his department at MCC, "we try to work more efficiently," Meyer continues. Without having to lay off anybody, "we have either frozen or held a lot of positions, and I think



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"APPA IS A STRONG, DYNAMIC ORGANIZATION THAT RIGHT NOW HAS A UNIQUE AND IMPORTANT OPPORTUNITY."

we're going to see that at almost all educational facilities. To a large extent, departments are not backfilling positions. We're doing everything we possibly can to maintain our building standards, our level of cleanliness, while keeping our equipment maintained and operated with fewer people," he says.

In his two decades in facilities management at MCC, says Meyer, technology has driven most of the changes he has seen in "the way we educate students and the way we operate buildings." These days, he says, buildings are operated through sophisticated computer management systems that include digital controls of heating and air conditioning systems as well as lighting and other systems.

"Anywhere I can log into the Internet, I can get online and turn lights on and off, turn building temperatures up and down, and control rooftop units. You couldn't do that 20 years ago. If somebody in a building complained about heat, you'd send somebody out there and they would go in with their gauges and tweak the thermostat and hopefully everything would be okay," Meyer says. Now, technology can handle that, as well as other issues like security, with integrated security systems, card access to buildings, and sophisticated fire alarm and notification systems, he adds.

MEMBER INVESTMENT GOALS

As he looks at how facilities management has developed over the 20 years he has been involved in it, Meyer also looks at how APPA has developed and where it stands today, "APPA is a strong, dynamic organization that right now has a unique and important opportunity," he says. While the strategic plan that the association developed in 2006 led to development and implementation of seven key strategies, "now it's time to develop new objectives for this year and beyond," he declares.

He outlined them in his President-Elect's Report in May, in which he identified "Investing in Your Future" as the theme of his presidency. "APPA's greatest resource is its diverse membership and the vast amount of knowledge associated with them. It is an organization that exists for its membership and as such should strive to provide the resources for members to identify and take full advantage of their potential as facilities professionals," he asserts.

Meyer says he plans to focus as President on "the critical challenge of the economic

crisis" that facility professionals are facing. He also will promote "the need to expand the availability" of programs that would engage young facility management professionals; create programs that encourage synergy among the international, regional, state, and local chapters; and develop "a strong membership recruitment initiative."

He points out that an APPA/Regions Task Force has been formed to define and identify joint international APPA-regional association goals with regard to mission and roles, program content and delivery, and overall leadership development. "This will result in a new and refreshed synergy between international APPA and the regions and chapters, thus keeping APPA as the association of choice for educational facilities professionals," Meyer says.

Another initiative already underway is a group that will strive to increase APPA membership in underserved areas such as community colleges, small colleges, K-12 schools and HBCUs (historically black colleges and universities) and "look at ways that APPA can better engage these institutions."

"It is more important than ever for APPA to be resolute and continue to develop programs based on its strategic plan in these uncertain times. Facility professionals need to provide new and effective leadership now more than ever. The broad impact of facilities on an educational institution's success provides an unprecedented opportunity for facility professionals and also new skill set opportunities," he stated in his report. "APPA must take the leadership role in identifying the most critical facility issues and quickly respond with focused and targeted initiatives that will provide members with the resources they need and demand."

THE PERSONAL SIDE

Meyer, who holds a Bachelor of Construction Science degree from Kansas State University and a Master of Project Management from the Keller Graduate School of Management, also sees his year as APPA's President as an opportunity to "give back" to the organization that helped him get started in facilities management in the first place. That reflects his personal philosophy and practice as well. "I've always felt driven to be involved in something that gives back to society," he says.







He and his wife, Jane, have long been active youth sponsors in their church, involved with the youth choir and on many mission trips. Working with their youth group and with Habitat for Humanity for 12 straight years, they have built more then 30 homes in Pensacola, Florida.

Their son, Marc, an Eagle Scout, is a senior at Kansas State University. A daughter, Erin, married with a daughter, has a doctorate in physical therapy and works in that field. Another daughter, Lisa, also married, has a master's degree in architectural engineering and designs building and lighting electrical systems. They also have a granddaughter, with two grandchildren on the way.

Away from MCC, Meyer likes "anything that has to do with the outdoors," particularly camping, fishing, and hunting with his son.

He also admits that he is "kind of known" for his barbecue talents. After collecting "a whole display case full of ribbons" in competitions, he now barbecues as a hobby, often at charity fundraisers and community events. "Baby back ribs, beef brisket, smoked pork shoulder, sausage, I don't have a specialty. We make a lot of our own rubs and sauces," he says. "I've tasted his barbecue and I've been really impressed," adds former chancellor Snyder.

Now Meyer looks forward to cooking up a successful year for APPA as well. ③

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

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Arkansas Excellence

PPA's highest institutional honor, the Award for Excellence in Facilities Management (AFE), recognizes those educational institutions whose facilities management organizations demonstrate quality in overall operations and effectiveness.

The two most recent recipients, Arkansas State University-Jonesboro and the University of Nevada-Las Vegas, were honored at the awards banquet during the APPA 2010 conference held in July in Boston, Massachusetts.

Since the AFE Award's inception in 1988, when Brigham Young University and the Medical College of Georgia were the first recipients, fewer than 50 institutions have received this distinct honor.

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

- Leadership
- · Strategic and Operational Planning
- 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. As you will read in the following pages from ASU-J and UNLV, it takes teamwork from everyone within the facilities organization and requires coordination, motivation, and support from the top levels of leadership to be a successful facilities operation and to win the APPA Award for Excellence.

The deadline for applications for the 2011 Award for Excellence is January 31, 2011. Successful candidates will be honored at the APPA 2011 conference July 16-18 in Atlanta, Georgia.

To apply, visit: http://www.appa.org/recognition/awardsfor excellence.cfm

To view past AFE winners, visit: http://www.appa.org/ recognition/excelwinners.cfm



ARKANSAS STATE UNIVERSITY

BY AL STOVERINK

Al Stoverink is the associate vice chancellor for facilities management at Arkansas State University, Jonesboro, AR. He can be reached at astoverink@astate.edu. This is his first article for Facilities Manager.

rkansas State University-Jonesboro (ASUJ) is a Master's Comprehensive Level 1 institution of higher education, and is recognized for offering special services to the people of the Mississippi Delta in Arkansas. It is the only comprehensive public university located in this region.

Facilities Management (FM) provides services for an enrollment of over 12,000 students, maintains more than 3.9 million square feet of building space, and maintains a core campus of 577 acres.

FM maintains daily operations for all physical assets of the Jonesboro campus, with shared responsibilities in auxiliary spaces. FM employs 196 staff and has an annual budget of approximately \$13.3 million.

Our department mission statement represents the common vision throughout FM. From front-line staff to senior management, FM employees are proud to be the face of the university, and recognize their role in a common campus vision and operating strategy put forth by the Division of Finance and Administration.

MISSION:

We are committed to excellence in customer service, safety, and integrity. We provide an environment that promotes quality learning through effective leadership and innovative development of Arkansas State University Facilities.

VISION:

We are a collaborative, problem-solving team that supports the educational mission of the University

LEADERSHIP

FM consists of four levels of leadership-three formal and one informal. The three levels of formal leadership are senior staff, middle management, and team leadership. The fourth level, informal leadership, consists of all members of FM who are not in a classification with supervisory responsibilities. This perspective is based on a philosophy that "leadership is for everyone" and that employees at all levels are truly empowered to make decisions, contribute ideas, and influence service excellence in a positive or negative direction.

In 2005, the associate vice chancellor commissioned the creation of the Employee Satisfaction Task Force, who in turn established a 12-member, non-supervisor AVC Advisory Board. Those serving on the AVC Advisory Board are elected by their peers and include representatives from all service departments. This group meets monthly to assist the AVC in identifying problems from a support staff perspective, and to help improve work environment issues.

Employees are encouraged to practice constructive criticism, and to attend productive team-building workshops when available. To help develop these skills, FM is currently actively engaged in sending staff through the Dale Carnegie Human Relations Course, with a budget dedicated to send 20 people per year. Senior staff members are being sent through the APPA Leadership Academy.

STRATEGIC AND OPERATIONAL PLANNING

The daily objectives at FM are an extension of the ASU Strategic Plan and the Division of Finance and Administration's Organizational Operating Strategy. In the summer of 2005, FM compiled a spreadsheet of all criteria for the APPA Award for Excellence, listing practices already in place or in the process of being implemented within the department. A department-wide evaluation gave all employees a chance to review the document and make suggestions. These document became the FM Strategic Plan and was titled The Journey to Excellence.

CUSTOMER FOCUS

ASU Facilities Management operates as a business, and is keenly aware of the connection between good customer communication and a satisfied customer. This requires FM staff to be connected to customers through positive internal and external communications.



Polly Pinney presents the AFE Award to the Arkansas State University team.

FM uses customer satisfaction surveys to measure the customer perception of critical factors such as promptness, courtesy, responsiveness, and understanding customer issues. On an annual basis, FM administers a campus-wide online Customer Services Survey for stakeholder input.

After each external customer-generated work order is closed, an e-mail is automatically generated to the customer asking for feedback regarding promptness, courtesy of staff, and satisfac-



tion with quality of work. Customers are then given the opportunity to be contacted for follow-up issues or concerns. The QuIP (Quality Improvement Programs) office collects and forwards this data to departments for follow up.

An FM Service Guide is distributed to all new campus employees and building liaisons. It is also available on the FM website. Available online at http://facilities.astate.edu/, this website is updated as changes occur to help guide our customers and the campus community to FM services. Contact information is posted online for senior staff and supervisors.

INFORMATION **AND ANALYSIS**

FM contracted with a professional consultant in 2006 to evaluate our current practices related to establishing Key Performance Indicators (KPIs). This process identified the KPIs that would help us define the necessary reports and organizational methods for gathering information and ensure a successful measurement of workplace performance in all FM service areas.

Employees set personal goals regarding KPIs during their annual performance evaluations, which we now refer to as Continuous Improvement & Team Development Discussions. Staff may choose from a list of common KPIs such as work order completion time, leave tracking, or customer feedback ratings. They may also elect to use established KPIs that specifically address their day to day duties. By setting personal goals and tracking their performance, employees better understand their role in the overall performance of the department.

ASU also participates in the annual APPA Facilities Per-

formance Indicators survey. Once completed, it is presented to the AVC for review. After review by the AVC, it is then reported to the Vice Chancellor for Finance and Administration, then forwarded on to the Chancellor.

DEVELOPMENT AND MANAGEMENT OF HUMAN RESOURCES

A key function of QuIP is the development, delivery, and coordination of a comprehensive training and professional development program for all FM employees. An assessment of training and development needs is conducted periodically. An information database was also developed and is maintained to provide a profile of each employee's training and development.

FM new employee orientation is a priority and begins with a video overview of the Journey to Excellence. New employees are familiarized with their personal "Facilities Training Institute" training program, which designates annual training curriculum requirements, priorities, expectations, and training schedules.

Communications is recognized as a key to both employee and customer satisfaction. A number of communication tools are used:

- · Photos of all FM staff are posted in the main hallway on a board entitled "Who's Who in Facilities Management," which include their name, starting date, and service area. The philosophy is that good communication starts with a name and a face, which this display provides for everyone at FM.
- · Front-line staff who spend a majority of time on site are given scheduled computer use time every two weeks to check e-mail and visit websites to stay informed on current events in the ASU community and career related information.
- · The AVC for Facilities holds monthly open forums to establish communication lines across all FM departments, their employees, and the campus community.
- When new opportunities for advancement arise, all employees receive e-mail notification and hard copy postings on bulletin boards, which detail job descriptions for the positions offered.
- The FM Voice newsletter is published four times a year as a communication tool for FM employees, and is readily available to the campus community through the FM website.
- · A widescreen plasma monitor in the central break area displays local radar as well as announcements on upcoming events and training in FM and across campus.
- The AVC Advisory Board administers an annual employee satisfaction survey. Results are posted in a formal display in the FM break room. Survey results are also distributed in the FM Voice as well as posted on the FM website. The AVC Advisory Board plays a role in raising employee concerns and making recommendations on a broad list of assignments including employee recognition and morale building activities. This builds and develops teamwork among employees and departments.

The team leader concept with cross functional teams at Facilities works to provide the opportunity for supervisors to move and change employees' assignments within a variety of job assignments. This creates opportunities for employees to learn new jobs and build skill knowledge levels.

FM recognizes employees for accomplishments and service throughout the year. A formal employee recognition program awards individuals for exemplary performance in attendance and safety. Employee of the Quarter and Employee of the Year awards provide recognition for overall outstanding performance. For everyday recognition on an individual job or project basis FM uses kudos cards. Kudos cards can be printed from the FM website or obtained from QuIP, addressed to a particular individual or unit, and then laminated and posted in the FM break room on the Wall of Honor. Kudos cards are also placed in the recipient's personnel file.

FM holds an annual employee appreciation day, which includes a softball tournament, friendly competition, camaraderie, and high energy during a time when operations are slow. It is a great boost for morale.

PROCESS MANAGEMENT

FM implemented FAMIS (Facilities Administration Management Information System) software with an update to version Xi planned for this fall. Billing, procurement, facility inventory, and academic scheduling interfaces between FAMIS and the campus

Banner system have been achieved. Additional interfaces with accounts payable and Human Resources are planned or in development. Employees use FAMIS to track equipment repairs, evaluate replacement needs, and develop repair histories that report cost.

FM installed the FAMIS Preventive Maintenance (PM) Module to track preventive maintenance on all critical and non-critical common use equipment. These scheduled PM procedures detail the required maintenance, tools, and safety procedures necessary to perform the recommended preventive maintenance task. All major equipment rooms are cleaned and painted to make them easier to maintain, which also develops a sense of ownership by the employees responsible for them. Custodial PMs consist of automated work orders for cleaning fixtures and surfaces that would normally become corroded or unsightly without regular attention.

PERFORMANCE RESULTS

FM has adopted the APPA Staffing Guidelines to determine service levels for ASU in relation to custodial, grounds, and building maintenance standards. FM Custodial Services uses APPA standards in regard to cleanable square footage, attempting to realize the most efficient methods and adequate staffing for a given building based on the total area serviced. The same standards apply to Landscape Services in regard to maintained acreage per front-line employee.

Custodial Services uses green cleaning techniques and products to reduce the number of indoor air pollutants.

Annual employee satisfaction surveys and customer satisfaction surveys indicate a positive work environment that promotes motivation and productivity, which results in satisfied customers.

CONCLUSION

Overall, Facilities Management employees at ASU see themselves not only as part of a functioning unit, but as part of a family. The relationships formed within the department and with the campus community at large through everyday work and collaborative volunteer efforts garner a feeling of belonging and well being at the university. As active participants in the execution of the ASU mission, FM employees continually strive for excellence in customer service, safety, and integrity.





UNIVERSITY OF NEVADA-LAS VEGAS

BY RICK STORLIE

Rick Storlie is director of administrative services and energy management at the University of Nevada-Las Vegas. He can be reached at richard. storlie@unlv.edu. This is his first article for Facilities Manager.

n its 52-year history, UNLV has undergone an amazing transformation from a small branch college into a thriving urban research institution of 29,000 students and 3,300 faculty and staff located in more than 5.4 million square feet on a 332-acre main campus. The Facilities Division employs more than 300 individuals. The team members are experts in the areas of Planning and Construction, Facilities Operations, Landscape and Grounds, Custodial and Recycling Services, Energy Management, Administrative Services, and Work Management.

The Facilities Management Department is committed to our mission of maintaining state-supported facilities in the most aesthetically pleasing and optimal operating condition

possible, while creating and maintaining an environment that encourages and enhances the education experience with every decision we make.

It's the goal of Facilities Management to be world-class in everything we do and create an identity that is synonymous with integrity, professionalism, and excellence.

LEADERSHIP

The Executive Director of Facilities Management reports directly to the Senior Vice President for Finance and Business. The Executive Director supervises a Director of Facilities Management, a Director of Administrative Services, an Assistant Director of Work Management and an Assistant Director of Custodial Services and Recycling. All employees have clearly defined performance objectives and work performance standards that must be adhered to and are evaluated against these at least annually.

STRATEGIC AND OPERATIONAL PLANNING

Goals are set annually and are published in our annual report to the Senior VP of Business and Finance. Department/section heads share goals with their employees and convey what each must do to help the goals. The annual report brings the previous goals full-circle by documenting progress/completion of items from the previous year.

The annual APPA Facilities Performance Indicators (FPI) survey results are also reviewed and incorporated into our goals and objectives. Results from these activities help drive action within the organization to improve or in some cases, get our message out to stakeholders who are not aware of our activities.



The UNLV team accepts the AFE Awar

CUSTOMER FOCUS

Facilities Management leadership meets with deans, department heads, and program directors to determine their concerns and provide them with information related to upcoming work that will affect their facilities. FM has

established a Building Proctor Program in an effort to foster better communications our clients. The program provides proctors with a direct line of communication to a facilities manager that can help prioritize needs and concerns or answer questions in a timely manner.

FM also conducts a campus survey once per year that questions clients in a variety of areas such as cleanliness, staff attitudes, maintenance of facilities, professionalism of help desk staff, and convenience of FM tools to name a few. Finally, FM performs

an annual internal employee survey to gain the insights of staff members and measure the work climate. Staff can voice their opinions on a wide range of topics and make suggestions. Results and comments are forwarded to appropriate FM leadership and used to make improvements or address specific concerns.

INFORMATION AND ANALYSIS

The APPA FPI survey, in-house customer satisfaction surveys, and benchmarks and performance indicators generated monthly contribute to our self-improvement efforts. Energy and water consumption graphs are also monitored and updated continuously. A remote metering program captures energy usage in all facilities and is viewable at anytime from the Energy Management section of our website. Our Environmental Controls application continuously monitors HVAC performance. Remote electrical metering and electronic environmental controls allows us to immediately see the effects of our activities and find other areas where we can improve.

FM uses a 100 percent cost accounting approach breaking down expenditures into both macro and micro levels. Our accounting structure was recently modified to simplify data entry. Rather than using multiple account numbers for expenses under facilities responsibly, we group all expenditures into five

major classifications: Maintenance, Grounds, Custodial, Administrative, and Capital. Relational database reporting provides us the means to group expenses by any data point. Reporting can be in a snapshot or trend analysis by any calendar frequency. Facilities Management is responsible for managing the state allocation of \$34.7 million annually.

DEVELOPMENT AND MANAGEMENT OF HUMAN RESOURCES

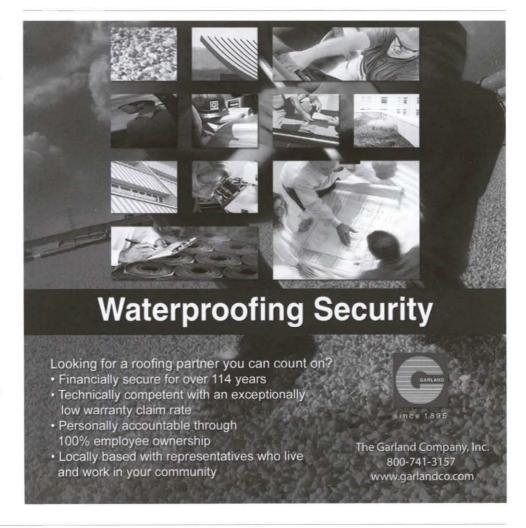
All positions are clearly defined by the State of Nevada Position and Classification System. Each classified employee is presented with an Essential Functions statement. All employees are urged to attend classes to further their education and increase their job and promotional opportunities. UNLV allows employees to take classes for college credits for a greatly reduced rate.

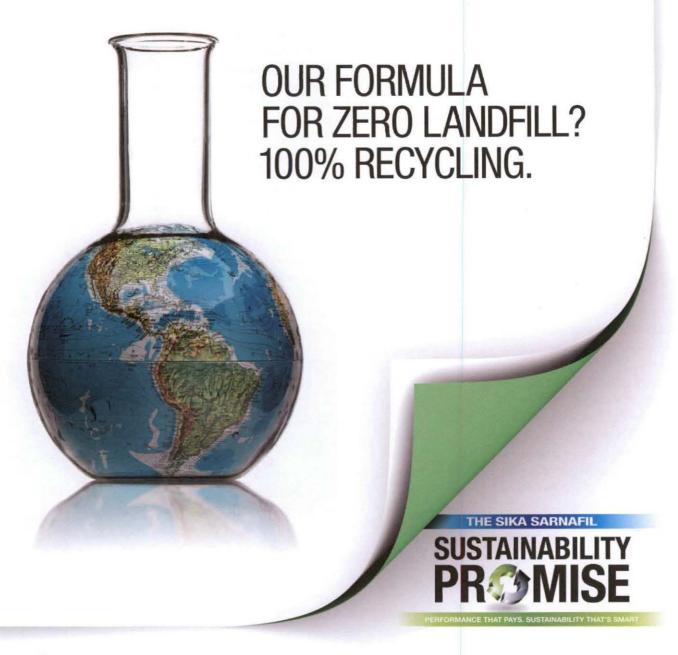
The Classified Employee Council has a development fund that is used to reimburse employees for out-of-pocket expenses for such things as classes, training seminars, workshops, conferences, and certification programs. Many staff members teach classes and lead sessions on topics such as backflow prevention training, landscape maintenance, and work management operations. Supervisors and leads train subordinate staff on their positions so they are qualified for promotion, especially as employees retire or leave the university.

PROCESS MANAGEMENT

Processes are in place to ensure that departmental facilities and equipment are adequate for the provision of effective and efficient services. During planning and design review, all FM leadership and trade supervision are involved to insure standards are being adhered to, systems and equipment are adequate to properly service the facility, and maintenance can be performed in a reasonable and cost-effective manner. FM leadership also does a review of our needs annually so that acquisitions can be requested in budget line items of various funding sources.

The FM Responsibilities Policy establishes the kinds of work performed by Facilities Management and identifies the entity responsible. Staff members have been trained to recognize work not done by FM, work that is considered non-routine, or work that is sensitive in some nature and may require further consideration by leadership.







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Trade leads or forepersons are responsible for assigning or scheduling each work request to the appropriate technician based on the skills and certifications needed to perform the work and the existing backlog previously assigned to the individual. Leadership then has options to shift labor resources from one shop to another when practical or solicit help from outside vendors.

PERFORMANCE RESULTS

The FM Responsibilities Policy reflects what state budget dollars are meant to maintain as well as specifies budget responsibilities for non-FM issues. These standards lay the groundwork for how our facilities will be maintained and take into account the image, mission, and programs of the university. FM continues to be as proactive and service-oriented as possible while keeping the university's best interests at the forefront of everything we do each and every day.

UNLV has a comprehensive standards manual that architects and builders must adhere to. FM leadership participate in plan and drawing reviews to ensure standards are being met and structures, equipment, hardware, finishes, piping, and wiring being considered are appropriate and able to be maintained in a cost-effective manner. FM makes sure our technicians have all the tools, equipment, and training necessary to maintain all facilities and infrastructure.

Only FM trades or authorized vendors are allowed to perform work on campus. The PM and PdM programs are a key element of our efforts. These programs are continually evolving and help predict failures, increase reliability by optimizing performance, and extend useful life. They also help us determine end of useful life well in advance so planning and budgeting can take place and an orderly and timely replacement can be accomplished.

OTHER CONSIDERATIONS

FM compiles and publishes an annual Planning and Budget Information Book. also known as a Fact Book. The book is a summary of our efforts over the past year and shows trends from as far back as five years where such information is available. All sections that report to the Senior Vice President of Finance and Business compile and submit a Fact Book.

The UNLV Facilities Management Department won the 2009 Cashman Good Government Award. The award recognizes Nevada government employees or entire departments that show innovation or extra initiative in running programs efficiently. FM was recognized for efforts under the category of Sustainability. Namely, the focus was on the department's recycling efforts as well as steps taken to avoid nearly \$11 million in utility costs since 2001.

FM continues to take advantage of the opportunities afforded by current and emerging technologies to enhance, streamline, and improve the quality of the many work processes that govern our operation. We also look for ways to save paper where practical and provide customers easier access to services and information while reducing or eliminating the need for employee assistance.

FM is proud of our efforts to maintain a diverse workforce. Working with HR, the department is committed to maintaining a balance between male and female employees representing a variety of race, creed, color, ethnicity, and religious beliefs. We also pride ourselves in providing an environment where all employees can succeed and achieve their career goals, as well as demonstrate good hiring practices where qualification, experience, and good work habits are highly valued assets. (3)



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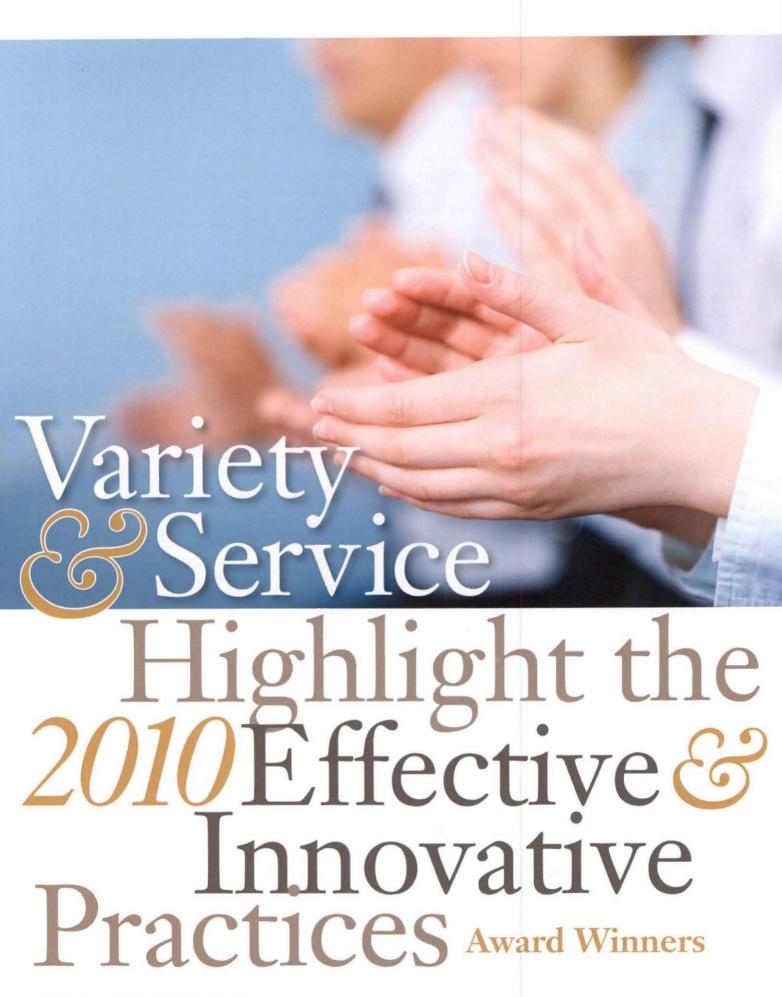
HOW DOES

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www.sustainabilitythatpays.com



APPA's Effective & Innovative Practices Award continues to highlight the best of the most 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 2010 award-winning programs featured here focus on student design teams; building services sustainability; fast-acting energy improvement teams; recycling; and a reengineered maintenance parts and materials process.

Up to five Effective & Innovative Practices Award submissions are eligible each year for a cash award of \$4,000, generously sponsored since the award's inception 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 this year received special recognition and a check at the APPA 2010 conference in Boston. The presenters were APPA President Polly Pinney, Professional Affairs Committee rep Jodie Sweat, and Sodexo's Tom Loony.

The 2011 Effective & Innovative Practices Award is open, and the deadline for completed applications is January 31, 2011. Winning institutions will receive recognition at the APPA 2011 conference next July 16-18 in Atlanta, Georgia.

To learn more about the E&I Practices Award: http://www. appa.org/recognition/effectiveandinnovativepractices.cfm

To view past E&I recipients: http://www.appa.org/ recognition/innovativewinners.cfm



California State University, Northridge

STUDENT DESIGN TEAM PROGRAM

Recent Example - The CSUN Subtropical Rain Forest Team

BY BRUCE WEINSTEIN

Bruce Weinstein is the director, logistical services, for physical plant management at California State University, Northridge. He can be reached at bruce.weinstein@csun.edu. This is his first article for Facilities Manager.

> alifornia State University, Northridge and its Physical Plant Management Department continue to

lead the way with innovative endeavors, demonstrating its commitment to conservation, sustainability, and ongoing support of the university mission and values. In response to those endeavors Physical Plant Management's Student Design Team Program, which has been in effect for more than ten years and has been continuously refined to establish a



repeatable and highly successful program, remains unmatched by other institutions in its ability to achieve optimal student involvement in major facilities projects and initiatives. The program has been developed to such a degree that new and innovative projects, which conventional means of implementation would hinder or risk failure, can be implemented with assurance.

The CSUN Subtropical Rain Forest is one recent yet extraordinary example of this program. A particular CSUN academic core value that is also inherently part of the Student Design Team Program is the "Encouragement of Innovation, Experimentation, and Creativity." The team was encouraged to take intellectual and creative liberties in the development of this unique project.

As one of the largest departments in CSUN, PPM supports the university mission by ensuring a functional and safe campus environment where students can thrive. Many CSUN students are afforded "real world" occupational experience as student employees in administrative services, payroll, work order processing, construction management and engineering services within the PPM workforce. Through the years, PPM has established itself

as a model organization that utilizes and benefits from collaborative teamwork, to include the use of CSUN student employees as an important resource. Over the last several years, PPM has continued with this team philosophy by completing a number of notable projects to minimize the university's impact on the environment, to make our campus environment more sustainable,

and to help CSUN become more energy independent.

Consistent with this environmental consciousness and teamwork philosophy, PPM staff, Biology staff, CECS faculty and CSUN students developed and created a one-of-a-kind, subtropical rain forest. This was a "first of its kind" project that challenged the team to utilize "outside the box" concepts and modern technology in a way that has never been done before. The CSUN rain forest is a superb example of the seamless integration of technology and the environment, and it was brought to fruition by the subtropical rain forest team.

Subsequently a fuel cell power and chiller plant was installed on campus at what is now known as the satellite central plant, creating an exciting opportunity to recover and utilize all of the waste byproducts of the Combined Heat & Power (CHP). Waste heat collected from the campus classrooms and labs would ultimately be circulated through cooling towers, and the CO2 exhaust stream and effluent waste water from the fuel cell could be used to create a perfect environment to support a subtropical rain forest and minimize our industrial impact on the environment. The project provided a unique and cost-effective approach to sustainability and the most sustainable fuel cell CHP and chiller plant possible. The 15,000-square-foot subtropical rain forest has more than 3,500 plants of over 100 species and uses the waste streams

from the satellite central plant in a positive environmental way.

PPM staff and the student design team joined to form a construction team that was organized in such a way as to utilize the best practices of construction management at risk and design build project management methods. With PPM acting as the design build construction manager (CM at risk), there were extraordinary opportunities for collaboration. Such approaches have been developed to a science at CSUN allowing optimal opportunity for our faculty and student body to collaborate on major initiatives, gain invaluable experience, and contribute to innovative design and real-life implementation of those same concepts. The project started in May 2007, and the Subtropical Rain Forest and satellite central plant were completed in April 2009.

This is a "one of a kind" project that has no equal anywhere else in the world. Since the initiation of the subtropical rain forest we have had visitors and dignitaries from around the globe who all proclaim this achievement as extraordinary. The project could not have been achieved without the team effort of CSUN students, faculty, staff, and industry partners, which this Student Design Team Program brings together.

Currently the campus is installing the first (in the world) grid connected 100kW high efficiency triple junction photovoltaic power system in collaboration with Boeing, the U.S. Depart-

> ment of Energy, and other industry partners. This collaboration also has Student Design Team aspects underway that support this new and unique development and partnership.

Through the continuing work of the Physical Plant Management Student Design Team, we make a commitment to promote educational opportunity, inclusion, and excellence through collaboration, innovation, and active learning in a manner that is beneficial to the students, staff, faculty, and university. These extraordinary projects will continue to serve the university for years to come through their contribution to minimize the university's impact on the environment, to make our campus environment more sustainable, and to help CSUN become more energy independent. The students will graduate with the accomplishment of having played an active role in changing the landscape of their university and with the experience and confidence that they are equal to the many challenges that await them.



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VHB has collaborated with the U.S. Green Building Council on its latest resource for the higher education sector, Roadmap to a Green Campus.

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Purdue University BUILDING SERVICES SUSTAINABILITY PROGRAM

BY GAIL RIESE

Gail Riese is communications manager for Purdue University Physical Facilities, West Lafayette, IN. She can be reached at gariese@purdue. edu. This is her first article for Facilities Manager.

urdue University's Building Services staff has earned APPA's Effective & Innovative Practices Award for its sustainability program. The department created a comprehensive sustainability plan incorporating an environmentally friendly green cleaning program with an innovative, campus-wide recycling program.

GREEN CLEANING PROGRAM

Purdue's Green Cleaning Program incorporates environmentally friendly cleaning, floor and carpet care, and consumable supplies. Program implementation began in the fall of 2008 and was completed in summer 2009 with specific aims to reduce solid waste and water pollution, and improve air quality through the elimination of volatile organic compounds. Many cleaning chemicals are specifically selected to biodegrade in the open environment within 30 days.

"We investigate the entire life cycle of a product to determine how its manufacture, use, transport, and possible reuse impact the environment, positively or negatively," states Bob Morman, building services day general manager. "We use products made from easily renewable agricultural and forestry products. In doing so, we help not only ourselves but also American industry. Our

green products are all third-party certified, and they meet tough environmental standards that meet or exceed federal guidelines."

The reduction of caustic chemicals has also resulted in fewer workers' compensation claims related to inhalation of fumes, allergic reactions, and splash/splatter accidents. A strong emphasis on safe and healthy cleaning has also helped to build up the morale of the Building Services staff.

"Our custodians see themselves as stewards of the facilities

they clean, protect, and maintain," says Terry Ashlock, director of building services. "They recognize the importance of their role in quality of life issues that affect the entire staff, faculty, and student community."

Dramatic results have been realized since the Green Cleaning Program was implemented. The number of cleaning chemicals (i.e., multi-surface cleaners, floor finishes, carpet cleaners) has been reduced by 70 percent. Effluent waste water contaminants have been eliminated (i.e., disinfectants, corrosives, heavy metals, phosphates) as well as the number of air pollutants (respiratory hazards and aerosols).

RECYCLING PROGRAM

In July 2009, Purdue launched a comprehensive plan to boost the campus recycling rate and initiated a new, key component of the plan – desk-side recycling. This unusual concept significantly increased campus participation by making recycling easy and convenient.

Trash receptacles were removed and replaced with recycling bins at each worker's desk. Customers are now asked to walk to centralized areas to deposit trash. Additional recycling containers are also provided in every public space and transit corridor, every classroom, and break area. Office paper is separated while all other recyclable materials are deposited together.

"Our customers no longer need to think about what types of recyclable items go into which containers. They simply comingle all recyclables," says Ashlock. "Our focus is to maximize as many recyclables as we can, not the profitability of this action."

All levels of the university have embraced this recycling effort.

Building services staff act as ambassadors for sustainability by enthusiastically discussing the program with staff and faculty and student-led organizations are carrying the program to higher levels of success each semester.



SHARED SUCCESS

Purdue's sustainability program is attracting attention from other universities. "Our Big Ten peers are expressing tremendous

interest in what we're doing," says Morman. "Many of them plan to adopt key components of our sustainability programs for their campuses. Going forward we plan to continue supporting our friends and peers with their efforts to go green, and in the process, multiply the impact of our efforts across the country."

Three features make Purdue's sustainability program appealing to universities seeking similar results. First, during a period

of state budget cuts and financial pressures, the green cleaning and recycling programs deliver sustainable, measurable progress across the spectrum without increased staffing or funding. The cost savings are true, long-term savings that continue to increase and accumulate in proportion to the amount of effort and commitment behind their implementation.

Second, the program's modular design means schools can select from a buffet of program elements suited to their specific budgetary and operating circumstances. The design, operating results, and the individual elements of this program are readily transferrable.

And third, Purdue's willingness to share their experience reduces the lead time for other schools to realize tangible benefits. Purdue's research, testing, and development of chemicals, tools, and equipment identify a core of third-party certified vendors and manufacturers ready to assist any school looking to mirror the sustainability program.



University of Iowa

ENERGY HAWKS PROCESS

BY WENDY MOOREHEAD

Wendy Moorehead is the communications manager for facilities management at the University of Iowa, Iowa City. She can be reached at wendymoorehead@uiowa.edu. This is her first article for Facilities Manager.

o help offset state de-appropriations of historic magnitude in FY2009, the University of Iowa (UI) began looking for additional ways to improve energy efficiency and save utilities costs. Facilities Management (FM) determined it could accelerate energy-savings by assembling a team to streamline processes and develop new methodologies for identifying and correcting operational inconsistencies, equipment deficiencies, and system imbalances.

The Energy Hawks, named for the Iowa Hawkeyes, took flight in July 2009 to further reduce energy costs in 60 buildings. In short order, this quick-hit, high-impact team completed approximately 300 improvements in eight buildings, triggering noticeable changes in energy efficiency, building function, and occupant comfort.

Each year, the Energy Hawks program is expected to discover an additional \$1 million in savings. As this team migrates from building to building with a keen eye toward reducing energy waste, the Energy Hawks give new meaning to the phrase "Watching like a Hawk!"

THE ENERGY HAWKS TEAM

Saving energy and reducing utilities costs while improving occupant comfort is the goal of the Energy Hawks. The team consists of specialists drawn from various Facilities Management units and includes energy engineers, building controls technicians, maintenance personnel, and operations engineers. Team members are selected for a specific building based on their knowledge of the building systems. They work on solutions ranging from tuning, calibrating, and adjusting controlling devices to projects with longer-term paybacks like replacing dampers and louvers. To maximize efforts, the team searches out opportunities where a concentrated minimal investment will produce a major return.

INGREDIENTS OF SUCCESS Holistic Approach

Team members begin by looking at the building as a whole. They scrutinize energy data — chilled water usage, air flow, average temperatures—before visiting the building. By concentrating on the relationship between components, team members can uncover problems and finetune building systems to keep them functioning at a 90 to 100 percent efficiency level.

Cross-Organizational and Cross-Functional Team

The Energy Hawks employ a cross-organizational and crossfunctional method that facilitates collaboration across Facilities Management departments. Historically, utilities departments manage the systems leading up to the envelope of the building, and building maintenance departments manage the building systems, which can result in goals that are out of sync. The Energy Hawks promote working collaboratively to optimize systems.



Evolved Practices

In the past, core issues could go unresolved because there were not enough resources or time to commit to the process. Dedicating a full-time team to this challenge reveals opportunities for better systems management solutions. The Energy Hawks understand that they are creating measurable value by going beyond asking routine operational questions to the more comprehensive evaluation of "is it performing optimally?"

STEPS IN THE PROCESS

- Determine priority of buildings based on past energy usage on a per-square-foot basis comparing similar occupancy and usage.
- 2. Review building systems including drawings and testing and balancing reports and assign team members based on skill sets.
- Conduct a walkthrough of the entire building and all the systems with area maintenance personnel to gain a better understanding of the issues.
- Make a detailed list of findings and prioritize based on short-term, intermediate, and long-term projects.
- Work as a team and refer issues of greater expense or magnitude to a steering group.
- Communicate with each other and occupants throughout the process

Energy Hawks. FM staff members know the work they are doing helps save energy dollars and improve occupant comfort.

ENERGY HAWKS RESULTS

While some of the work will result in long-term paybacks, there are already a number of favorable outcomes.

In Trowbridge Hall, energy engineers have estimated annual savings of nearly 13.7 percent in electricity, 3 percent in chilled water, and 5 percent in steam. The Energy Hawks also documented 60 energy-efficiency fixes at the Nursing Building. In the Lindquist Center, the Energy Hawks discovered that exhaust fans were not cycling off on schedule. With adjustments to the exhaust fan scheduling and other finetuning, the systems in the building are now working in synchronization to create a comfortable environment with improved efficiency.

Tina Hass, assistant to the Dean, College of Education, sums up the process: "The experience with the Energy Hawks has been seamless and painless. They came in (Lindquist Center) and got to work with no disruption to the building occupants. Faculty and staff have commented on how much more comfortable their offices are and we have noticed a difference in energy efficiency and comfort levels throughout the building."

The ongoing analysis of data and customer feedback will help

ENERGY HAWKS SUPPORT

The University of Iowa has a strengthened emphasis on sustainability, led by President Sally Mason. She has publicly commended energy savings already in progress and has challenged us to do more. As further indication of support, the UI invested \$1M in the Energy Hawks during a time when most budgets were being reduced.

Other sources of financial support include reinvesting utilities savings from previous years, leveraging deferred maintenance and recurring maintenance funds and incentives offered through local utility rebate programs.

A steering committee meets weekly to plan the sequence of buildings to be inspected and to discuss more complex or expensive issues. The Energy Hawks also work with Building Coordinators and FM area managers to ensure collaboration and continued best practices.

Employee commitment is a major component of the success of the

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University of North Carolina-Charlotte

TAKE IT OR LEAVE IT TOUR

BY KATHY BOUTIN-PASTERZ

Kathy Boutin-Pasterz is the recycling coordinator at the University of North Carolina-Charlotte. She can be reached at kboutin@uncc.edu; this is her first article for Facilities Manager.

he Take It or Leave It program at UNC Charlotte is very simple: a staff member of the Office of Waste Reduction & Recycling gives away unwanted but useful items from the back of an electric cart to anyone on campus. Staff and students can take anything they want and are asked to bring their useful but unwanted items and leave it for others to take. A member of the recycling team will go on "tour" giving away and collecting unwanted items (that might end up as trash) while promoting recycling and waste reduction.

ABOUT THE UNIVERSITY

UNC Charlotte is North Carolina's urban research institution with approximately 24,700 students, including 5,300 graduate students, and supported by 2,600 faculty and staff. The 1,000acre campus is the fourth largest of the 16 institutions within the UNC system. The 11-member recycling team services over

1,300 bins throughout the academic, administrative, and facilities management buildings, covering 4.5 million square feet of interior space each day.

PROGRAM BACKGROUND

The Take It or Leave It program grew out of the popular FREE STUFF table that is used by the Office of Waste Reduction & Recycling during UNC

Charlotte's Welcome Week and America Recycles Day. Students eagerly take the gently used notebooks, file folders, page protectors, and binders that the recycling crew collects during its recycling routes on campus. Without space for a reuse store at UNC Charlotte, the Take It or Leave It Tour becomes a mobile reuse center. We initiated the Leave It component at the 2005 America Recycles Day event. We invited students to bring items to the table that they no longer need but are still useful. Students leave it for another student to take as needed and for free. The tour idea grew from that initial event, resulting in the program touring each lobby of every residential hall on campus.

The Take It or Leave It Tour puts the emphasis back on the first "R" REDUCE and promotes one simple way to decrease waste by giving away items that can be reused. Collegiate Recycling Departments spend a great deal of time collecting recyclables and educating the campus to "get it in the bin." The tour is designed to increase visibility and participation in resource conservation within the UNC Charlotte community by bringing it to the people. Participants in the Take It or Leave It Tour become more conscientious of recycling and reusing their school and office supplies.

The Take It or Leave It Tour is simple to operate and is managed by one staff member utilizing one electric cart. The Take It or Leave It Tour travels around campus, visiting academic and residence areas. Students and staff bring items to the table that they no longer need but which are still useful. Items are brought to the table and taken as needed. Quality reusable items that were formerly thrown away, such as books, notebooks, magazines, electronics, posters, sporting goods serve as the bulk for our giveaway program. Everything is free.

On average, nearly 100 visitors participate in the Take It or Leave It Tour over a three-hour period. Over the last four years the Take It or Leave It Tour has collected and given away thousands of pounds of items.

This program promotes campus wide involvement, through active partnerships within campus communities, especially the Housing & Residence Life Department. The Office of Waste Reduction & Recycling educates the campus about waste reduction and manages the Take It or Leave It Tour.



Facilitating campus reuse extends the life of resources, and helps to Keep Charlotte Green. The program inspires creative reuse and environmentally sustainable behavior by providing education and free materials to the campus community. Participants in the Take It or Leave It Tour become more active recyclers and environmentally aware.



University of Southern California

MAINTENANCE PARTS AND MATERIALS PROCESS REENGINEERING

BY DUANE HICKLING, FREDRIC MAUPIN, AND DONNA BUCHANAN

Duane Hickling is president of Hickling & Associates, Chicago, IL, e-mail dhickling@hicklingassociates.com; Frederic Maupin is managing principal of 5M Consulting, Glendale, CA, e-mail fivem5@pacbell.net; and Donna Buchanan is director; organizational and professional development, for FMS at USC, Los Angeles, CA, e-mail dbuchanan@fms.vsc.edu. This is their first article for Facilities Manager.

CHANGING THE WAY FACILITIES TECHNICIANS **OBTAIN PARTS & MATERIALS**

ow does a large research university move its maintenance supplies stockroom off campus while simultaneously increasing the actual amount of technicians' "wrench

time on equipment," and raise the completion rate of preventive maintenance work orders? Facilities Management Services (FMS) at the University of Southern California's (USC) University Park Campus simply changed its service paradigm. Instead of technicians hunting down parts and supplies, parts and supplies were brought to them.

BOSTON 1 \$4000.00 Chollass USC

CAMPUS SPACE: A PREMIUM

USC decided to move FMS off campus to make a building site available for the School of Cinematic Arts. Of primary concern to FMS was the relocation of the maintenance stockroom located only a few yards away and used by technicians in the completion of more than 1,000 stock issuances each month.

The new location, approximately a quarter mile off campus, was inaccessible via its fleet of electric golf-cart maintenance vehicles. Despite the change in location, FMS established a goal to improve the level of maintenance services to the campus.

FINDING OPPORTUNITY AMIDST LONGSTANDING PROCESS AND PROCEDURE

The FMS Organizational Development (OD) department worked with Hickling & Associates to create the internal climate and infrastructure conducive of supporting organizational change.

The Steering Committee - front-line staff as well as operations and administrative managers -- provided input on the existing acquisition process, which was unpredictable with high variation in cycle time and a significant amount of technician time spent on travel. This low-value use of high-value technician time was inefficient and contributed to the difficulty in scheduling work and informing customers of project timelines.

THE NEW DESIGN COMES ALIVE

We facilitated the process of overcoming perceived barriers, and with the Steering Committee brought the customized system to life by:

- · Defining the goal
- · Facilitating the development of the redesign
- Developing detailed Standard Operation Procedures (SOPs) to support the new process
- Testing the process to ensure its viability
- Establishing metrics to evaluate and monitor the process
- Developing and delivering training to everyone that touched the process
- · Implementing, monitoring, and measuring the process to get expected results.

BUILDING CAPACITY: THE ORGANIZATIONAL SKILL SET GROWS

The Steering Committee became involved in activities and processes that were normally not part of their work day. This led to skill development which is being used for other initiatives across the organization such as:

Marketing the new process design to the organization and

obtaining operational buy-in from front-line staff

- Creating Standard Operating Procedures as well as skills for tracking and maintaining updated SOPs
- Selling the use of reliable and relatively easy-to-use mobile technology to their colleagues
- Establishing the parameters for monitoring, and providing feedback on a pilot test of the process
- Developing a training program and training their colleagues on the Standard Operating Procedures in both Spanish and English
- Developing project management, teamwork, and problemsolving skills to address each stage of the project.

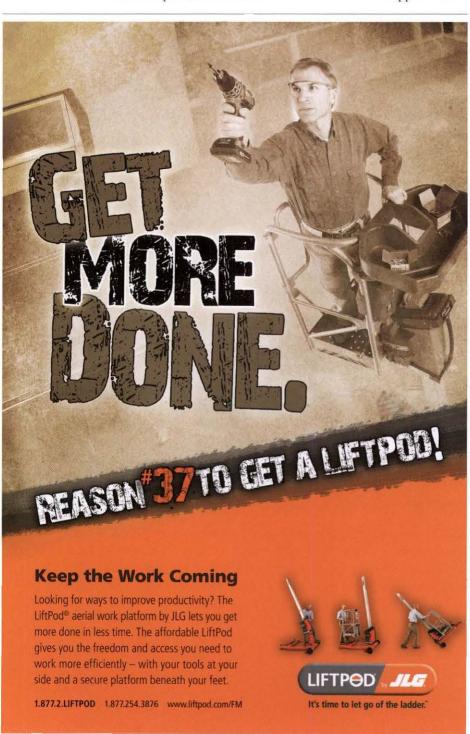
AND THE RESULTS WERE ...

The Steering Committee created a set of metrics to track success and potential problem areas that focused on nine major parts of the work processes created by the redesign. The committee found that:

- 1. The use of existing communication technology to order parts and materials from the job site has increased service efficiency and effectiveness
- 2. The amount of time technicians spend performing maintenance work has significantly increased by eliminating excessive travel time to retrieve parts and materials
- 3. Technicians now receive work orders for the week, allowing them to scope the work in advance and order needed materials. This scheduling provides the opportunity to more accurately inform customers when a job will be completed
- 4. The new process has improved performance management by allowing Facilities Management Services to set and adhere to performance standards for various priorities of work (e.g., emergency, routine, preventive maintenance, etc.)
- 5. There was an initial reduction in the cost of materials and supplies consumed
 - 6. Preventive maintenance work order completion rates increased from approximately 62 to 78 percent within six months
 - 7. The stockroom technicians track delivery schedules and accuracy of deliveries. Deliveries are 96 percent accurate. During the first three months, will-calls to the stockroom decreased to 13 per month while there was an increase in use of the system to nearly 100 percent of all orders
 - With the use of two-way text messaging, voice traffic over the two-way radios has declined increasing the airspace availability for emergencies and other critical organizational communication
 - The initiative provided a unique opportunity for employee participation in problem solving and opportunity for cross-departmental collaboration, which resulted in enhanced morale, improved interdepartmental communication, and greater organizational capacity to successfully complete other continuous improvement programs.

Both John Welsh, associate vice president of USC Facilities Management Services, and Chuck O'Regan, executive director of operations, agree that the primary reasons for the success of this initiative are that FMS partnered with the consultants to establish the vision, concrete objectives, and the approach to effectively accomplish the endeavor. Most importantly, FMS included a diverse crosssection of the organization, including frontline workers, in the analysis and reengineering effort. The Steering Committee's ongoing stewardship has also been a crucial factor.

To view the full report, which includes performance metrics and flowcharts of both the old and new processes, visit the USC Facilities Management Services website: http://www.usc.edu/fms/documents/White PaperUSCInnovativeEffectivePractices.pdf. (3)



APPA 2010 Conference and Exposition

APPA 2010 Exposition

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APPA 2010 Conference Highlights



APPA 2010 Conference Highlights

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President's Gavel Plaque and Ring from Darrel to Polly

Eagle Award



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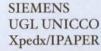
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Consultants	Silver**	Schooldude.com	Platinum**
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KLN Steel Products Co.	Silver**	Victor Stanley Inc	Bronze
Kullman Buildings Corp.	Bronze	Western Construction Group	Silver**
LASERtech Floorplans	Bronze	WFF Facility Services	Bronze
Lerch Bates Inc.	Construction of the Constr	Xpedx/IPAPER	Diamond**
M2 Consulting, Inc.	Silver**	mark market and the same	
Marcis & Associates Inc.	Silver**		
Max-R	Bronze **	***	
Miracle Method Surface Restoration	Silver**	** Denotes Ambassador Supporter	
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Silver**

Silver**

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President's Award



David Gray



Joe Metzger

President Award "Unsung Hero"



ERAPPA - Bob Britton & Jerry Hill (not present) MAPPA- Christine Douglas (not present) CAPPA - Doug Riat SRAPPA - Tony Yamada (not present) RMA - Shawna Rowley & Joe Metzger

Dan Whitezell



BOK Editorial Team - Maggie Kinnaman, Steve Glazner, Darryl Boyce, and Polly Pinney. Not present: Bill Daigneau, Anita Dosik, Jack Hug, and Gary Reynolds.

Pacesetter Award



L-R: Kristie Kowall, Juan Ontiveras, Ben Elisondo, Dan Gearan, Polly Pinney, Viron Lynch. Not present: Matthew Taylor.





Mike Battles

John Sumlin





Expert panel discussions provided a wealth of knowledge and insight to APPA 2010.

CFaR Awards



Bill Elvey





Focusing on BOK Part 2: **Operations and Maintenance**

By Gary L. Reynolds, P.E., APPA Fellow

here are exciting and new changes to APPA's primary source of information, the "handbook" or "manual." Perhaps the most significant change is the change of the title from Facilities Management: A Manual for Plant Administration to AP-PA's Body of Knowledge, or BOK. While this may seem to be a minor change, it is in reality a significant statement about the content and relevance of the information it brings to APPA's membership.

This "fourth" edition of the manual has been completely revamped and is now online. This important move to an online version has allowed the authors to provide access for the readers, through links, to websites with important additional resources. So now instead of just providing references at the end of the chapter, the reader can click on a link that has been placed right in the text and immediately explore the subject matter further. In addition, the new format will allow the insertion of short video/audio clips and graphics that can be used to enhance the material. The online format also allows the material to be accessed anywhere at any time by anyone on a campus that has subscribed to the BOK.

Over the past several years, APPA has been working to align its programs across the many educational resources provided by APPA. Thus, you have seen the Institute for Facilities Management become a four-track program in alignment with the third edition of the manual's four parts: Part I: General Administration and Management, Part II: Maintenance and Operations of Buildings and Grounds, Part III:

Energy and Utility Systems, and Part IV: Facilities Planning, Design, Construction and Administration. In addition, the new certification program is based on the information contained in the BOK, which continues to follow the format of the four parts. All of these changes are meant to provide a consistency in accessing the information provided through APPA's many venues.

BOK

Body of Knowledge

minimally used and have been dropped, including Parking Systems, Transportation, and Campus Mail Services.

And fourth, two new chapters have been added to the O&M section: Emergency Preparedness and Business Continuity, and Recapitalization Management.

What are some of the changes in the O&M chapters?

BECAUSE OF THE NATURE OF ONLINE PUBLISHING, WE NOW HAVE THE ABILITY TO CONTINUOUSLY UPDATE THE CHAPTERS AS APPROPRIATE, OR EVEN ADD NEW CHAPTERS AS NECESSARY.

OPERATIONS AND MAINTENANCE

How do these changes translate to the Operations and Maintenance (O&M) section of the new BOK?

First, many of the chapters within O&M section have been completely rewritten. Significant changes have been made to the Building Interiors, Building Control Systems, Building Electrical Systems, Building Fire Protection, Custodial Services, and Grounds Maintenance chapters.

Second, the chapters on Building and Architectural and Structural Systems, Building Mechanical Systems, Campus Security, Capital Renewal and Deferred Maintenance, Facilities Condition Assessment, Elevator Systems, Environmental Health and Safety, and Facilities Maintenance and Operations have had new sections added or material updated.

Third, several chapters from the third edition have been determined to be

First, we asked the authors to provide information that is relevant to issues we are facing today. While some theory is provided to ensure a broader understanding of the material, the chapters now include practical information for direct application to problems we face every day. Forms that may help organize the work or data gathering have been included, graphics have been improved to provide better understanding, links to many resources have been added at key points in the chapters, and new information in regards to regulatory requirements has been added.

For example, in the Building Interior's chapter, author Jean Sebbens has added a number of graphics that help with understanding various patterns in interior design work. Harvey Kaiser has provided sample forms in his chapter on Facilities Condition Assessment. And in the chapter on Environmental Health and Safety, Ralph Allen has provided links

directly to many of the Code of Federal Regulations (CFRs) that are cited in his chapter. These are just a few examples of the changes that are part of the new BOK.

Finally, because of the nature of online publishing, we now have the ability to continuously update the chapters as appropriate, or even add new chapters as necessary. So if there are important changes to security, such as changes to the Clery Act or changes to regulations governing elevators we will be able to update the chapters quickly, thus, ensuring that APPA's Body of Knowledge is always up-to-date.

The creation of the BOK has been a monumental effort by everyone involved, from the APPA staff, to the many authors, content coordinators and consultants, to create a truly new, comprehensive, up-to-date Body of Knowledge. I truly believe it will be a valuable tool for our members' use by providing answers and direction on many of the topics we all deal with on a daily basis.

Learn more at www.appa.org/bok.

Gary Reynolds is the Content Coordinator for the Operations and Maintenance section of the BOK. He is an APPA Fellow, Past APPA President, and currently the executive director of facilities services at the University of Colorado-Colorado Springs. He can be reached at greynold@uccs.edu.

Part 2 — Operations and Maintenance

Content Coordinator: Gary Reynolds

SECTION II-A: PLANT MANAGEMENT

- Capital Renewal and Deferred

- Work Management

SECTION II-B: BUILDING SYSTEMS

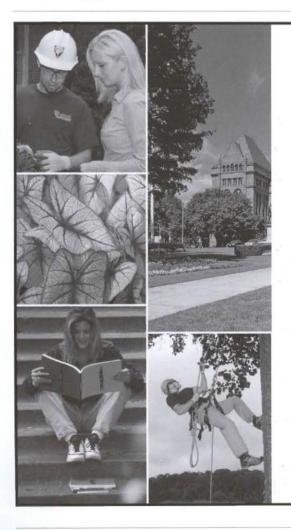
- Structural Systems
- **Building Electrical Systems**
- **Building Control Systems**
- **Elevator Systems**

SECTION II-C: PLANT SERVICES

- **Custodial Services**
- Facilities Maintenance and
- Grounds Maintenance and
- Solid Waste and Recycling

SECTION II-D: CAMPUS SERVICES

- Campus Security
- and Safety





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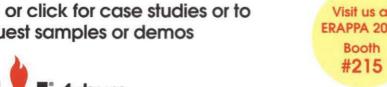


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Needs Indexing, Then Benchmarking, Now What?

By Matt Adams, P.E.

asked me to visit a number of asked me to visit a number of campuses to discover the best practices within our industry associated with facility portfolio management. It was a great project and resulted in a publication from APPA that recognized a trend of ever-increasing sophistication within our professional peers. Then and now there are a large number of change agents among our peers who research and apply industry best practices wherever appropriate.

The knock-on effect of this is that many of the tools and practices that have been introduced allow for some wiggle room, or even require further interpretation. Take for instance key performance indicators or KPIs. The good news about the wide array of metrics included in the Strategic Assessment Model and other publications is that there are many, and they are complex. The bad news is also that there are many, and they are complex. What initially seems like a simple key performance indicator can really require a great detail of understanding for proper use or understanding. This is the case with the Needs Index or its component, the Facility Condition Index or FCI.

UNIFORMITY

First of all, let me say that the FCI has been very helpful to our industry, and has been the cause of increased renewal funding. It has created a discussion that might not have occurred otherwise.

That being said, its use is commonplace and we now see the need for further refinement. Even before the APPA FPI

reports, the FCI was used as a benchmarking tool.

In theory, the condition index of my campus is compared to that of my peer group and this gives me some indication of how our funding and spending actions compare to others. The problem has been that peer FCI data is typically not a nice and statistically tight pattern like we would prefer to see. The data points can vary dramatically, and this hurts the utility of the index.

Some of the causes for this can be resolved and should be. For example, the denominator of the FCI and Needs Index is the current replacement value or CRV of your campus facilities. If two peer campuses use significantly different methods for calculating this value the index benchmarking value is reduced.

"AS A SIMPLE MEASURE IT
DESCRIBES OUR CURRENT STATE
AND PROVIDES A SNAPSHOT OF
THE BEGINNING OF A PROCESS..."

One might use the insured values and another the values extrapolated from a resource like RS Means. These two values can vary considerably. I suggest that for the case of APPA data collection future reporting cycles should provide some standard CRV factors for institutional facilities and that everyone be encouraged to use only these values. Ultimately, the importance is not the

specific accuracy of one individual building CRV but the relative accuracy of all of them. Put another way, it is okay if APPA supplied values are slightly wrong, as long as they are uniformly wrong across the board.

The indexes do provide useful information and generally most consider them a starting point. John Hoogakker, associate vice president of university facilities at the University of Richmond, and his senior staff have evaluated and established the proper use of the FCI. This department is progressive and puts great care into thinking through and testing best practices before simply accepting them. To John and his staff, the FCI as an index clearly provides the empirical backdrop and confidence to enter into the master planning and long-term capital budgeting process. "As a simple measure it describes our current state and provides a snapshot of the beginning of a process," he says. John goes on to say that "the FCI is also useful for both medium and large campuses where an administration cannot be all-knowing any longer due to the sheer number of facilities and some measurement is required."

THE STARTING POINT

Consistent with the latter point, David Northcutt, the director of facilities management and planning for Covenant College, views the FCI-related indexes as starting points of a process. He states, "A properly calculated FCI takes away the politics of the planning process and provides the initial direction." Covenant College is also forward thinking and strives to be good stewards of their built assets. However, the use of the indexes after the "snapshot" can often prove problematic.

The natural life cycle of facilities combined with the varied ages since construction or renovation creates a "saw tooth" in funding requirements each year that can render the indexes inaccurate or at least confusing if not properly accounted for. A period of measurement is required to allow for the law of averages to occur. Or put another way, the cycle time of FCI measurement from beginning to end point must at least span 50 percent of the life of all building assets.

EACH YEAR, WE NEED TO FURTHER DOCUMENT AND ADVANCE THE "OFFICIAL STANDARD" INTERPRETATION OF THE INDEX DEFINITIONS.

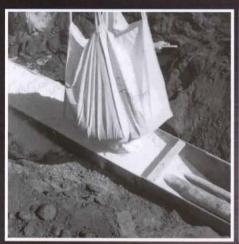
For example, if you determine that the average life cycle of all renewable components within your facilities is 12 years, then the FCI measurement cycle should be at least six years to capture the beginning and ending ebbs and flows of life cycle funding requirements. So a six year capital planning, measurement, and funding-cycle makes mathematical sense rather than using the FCI each year or two and adjusting each time.

At the July APPA 2010 conference in Boston, Harvey Kaiser and Eva Klein highlighted the content of their new book Strategic Capital Development: A New Model for Campus Investment. Included in the many good points presented was the emphasis of the importance of including a robust definition of programmatic capital "needs" in the formula for the Needs Index. Adding the functional and programmatic empirical scoring of facilities is clearly a valuable tool. Its answers the question characterized by the difference between building system performance versus facility serviceability. Already included in the APPA FPI surveys, this more complex KPI requires additional care in its creation and use. Recently trying to review some peer data for a university, it was clear to me that some submissions were calculated using more than one interpretation of the Needs Index KPI.

Our peers that are really thinking about stewardship and measurement of their facility portfolios are running into some limitations with our current performance indicators. Each year, we need to further document and advance the "official standard" interpretation of the index definitions. Some clearly think that we are ready to expand the body of knowledge associated with this set of performance indicator tools. (3)

Matt Adams is president of Adams FM2, Atlanta, GA. He can be reached at matt@ adamsfm2.com.

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How the System of Codes and Standards Works

By Kevin Folsom

s chair of APPA's Code Advocacy Task force, I offer the following FAQs to help new facility managers grasp control of the codes and standards that are in their midst.

What are your responsibilities related to compliance activities? How have those responsibilities changed?

All of them fall under my responsibility – ADA, NFPA, environmental, etc. We try to proactively deal with those through facility renewal and planned efforts. Occasionally, the compliance issue comes to us before we have renewal. So we're trying to comply but not utilize all of our funds (or waste funds) on those compliance issues before we get to the renewal. There's a balance that we have to work through. Pressing non-compliance issues are definitely motivators for planning renewal.

What are your top regulatory priorities, both now and in the future?

They're all important. We don't necessarily question the importance of regulatory priorities. The challenge comes with timing and feathering them into facility renewal so we can get full lifecycle value of a revised component.

What types of regulations and guidelines demand more time and resources to comply? Why? ADA would be the most comprehensive because it involves so many other planners and leaders on campus. But a really close second would be environmental as it relates to energy use and recycling, because it affects the behaviors of every single person on campus.

What are the most common resources or strategies you use to keep up on the latest standards and guidelines?

First you need to understand how the system works. The government relies on private industry (manufacturers, buyers, etc.) and nonprofit organizations (NFPA, ASHRAE, etc.) predominantly

PRESSING NON-COMPLIANCE ISSUES ARE DEFINITELY MOTIVATORS FOR PLANNING RENEWAL.



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for codes and standards development. While the government sets the course for big-picture goals, they're tapping into manufacturers, and buyers who sit on committees to develop and refine these codes and standards. Sitting on a committee is the most effective way to stay on the cutting edge. However, the committee members are required

to pay for all their own travel and time to participate, which can be costly and time-consuming.

So the committees function something like this: The manufacturers lean toward language in codes that help them sell more products (after all this is the primary impetus for their companies to pay for them to participate); the buyers

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lean toward codes that minimize spending (i.e., primary impetus is to spend money and time to minimize cost and time later); and the non-profit organizations want to sell codes and standards publications.

I don't describe it this way to make everyone sound purely like self-interest groups. The reality is that really good work is being accomplished. It's just that this is the elephant in the room that no one wants to talk about.

As a result of this scenario, manufacturers that stand to benefit most from code changes are eager to advertise and write articles about the changes. And the nonprofits provide magazines for these articles and advertisements to be published, which help disseminate the information.

What are cost considerations related to compliance activities?

It requires a lot of time. I could probably spend as much as 20 percent of my time solely on monitoring codes and standards and staying involved to make sure they're appropriately written and cost-effective. It's difficult for school leadership to allocate resources to facility mangers to participate on committees and attend conferences, because they are unable to see substantial benefits immediately.

What is the role of maintenance and engineering staff in complying with regulations and standards?

They're typically on the whip's end. By the time a new or updated code comes to them all the momentum cannot be stopped. They simply have to deal with it and try to help their leadership understand why they need to spend time and money to comply.

For managers new to maintenance and engineering management, what are the first steps they need to take related to compliance?



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Spend time reading all those free publications, and align with an association that most closely aligns to your type of industry. Facility management is no longer "all buildings are the same." It has pretty specific focus areas and there are good organizations out there that can save you time and money.

What type of feedback do you receive from occupants and visitors related to compliance activities?

ADA would be the one that is most often brought up by building users and visitors. But we also have people who seem to be getting ill a lot and want to blame the facility. So we simply have them fill out the proper complaint forms then begin the investigation as needed.

CONCLUSION

The primary purpose of this article was not to give the reader all the answers in codes and standards, but rather, to explain how the system works. These codes and standards come from years of work, and from thousands of volunteers working with funds from the institutions they represent. It is important for facility managers to be involved in this ongoing work.

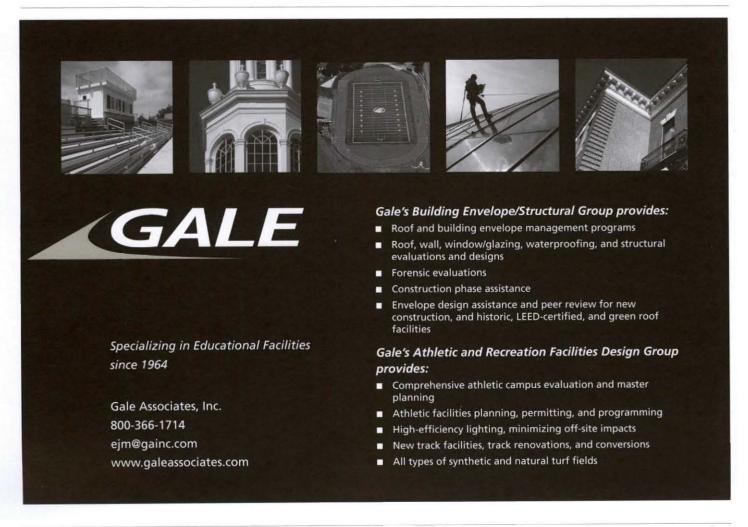
Fortunately for APPA members, the APPA Code Advocacy Task Force does most of the work for its members by collaborating with each other and strategically participating on the code and standards development committees. All members need to do is contribute feedback to comment solicitations on the APPAinfo listsery. If you're not the right person to contribute, forward it to the right one. A few meaningful

words are better than none at all. Most of the influence comes in numbers of those who contribute comments to these inquiries.

Finally, if you are participating on a code and standards development committee, please let me know so that we can include you in the APPA Code Advocacy Task Force dialog. 3

Kevin Folsom is director of facilities and plant operations at Dallas Theological Seminary, Dallas, TX, and the chair of APPA's Code Advocacy Task Force. He can be reached at kfolsom@dts.edu.

To purchase standards at a discounted price, visit APPA's Standards Portal: www.appa.org/webstandardsportal.cfm





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

This is a time for initiating changes to deal with restricted and constricting budgets, staffing changes, looking for efficiencies, trying to become a better organization. The facility officer is called upon to do more than just keep things working.

The first book addresses how to leverage teams to work effectively. The second book looks on the technical side to measure building efficiency and responsiveness to user needs. Right now, I'm up to my eyebrows in work that demands the help of both of these books. You may find similar reasons to use them.

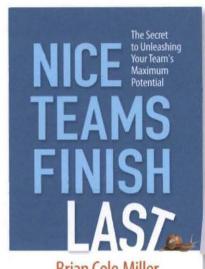
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NICE TEAMS FINISH LAST: THE SECRET OF UNLEASHING YOU TEAM'S MAXIMUM POTENTIAL

Brian Cole Miller, AMACOM Books, New York, NY, 2010, 204 pages, softcover, \$17.95.

anagement books all focus on La few things: difficult people; focusing teams; getting the most out of people; overcoming behavioral preferences; and resistance to change, to name a few. One of the latest books to appear from AMACOM is Brian Cole Miller's book Nice Teams Finish Last. The title is catchy and it caught my interest. As things turned out, meeting publication deadlines and regular work responsibilities meshed well with this book.

It is nothing new for the leader of a large organization to assign a team of different people to identify a problem and find solutions that will work to make the organization better. Leaders are good at finding symptoms that define a problem; the difficulty lies in getting the team to perform and excel in the assignment. In Nice Teams Finish Last, Miller identifies nine different styles of team members, a fairly comprehensive list

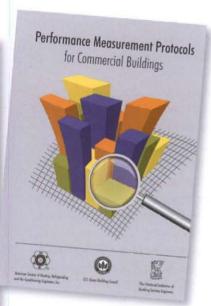


Brian Cole Miller

from my experience, and how they will work to suboptimize the team's output as they work together either being "nice" or "fierce."

Fierce is the opposite of nice and at the other end of the team's behavioral continuum presented. Miller describes nice as an ineffective working relationship among team members where each person retreats to his or her comfort zone based on their style and lets the compromise (least common denominator) solution win out. At the opposite end, fierce teams exhibit the visceral side of each person's comfort zone resulting in much the same compromise outcome but through cutthroat results. Neither gets to a truly effective solution quickly.

Between nice and fierce is "bold"an effective team behavior or attitude that gets the most out of shared ideas and opinions by working openly and courteously together. To achieve the bold results, the team leader needs to lead the participants to a balance of courage and compassion often by get-



ting them to commit to being bold and not nice or fierce. It requires a blend of Covey and Carnegie, "beginning with the end in mind," "seeking first to understand," "criticizing without being hated," and "making the fault easy to correct," among others. While there are several examples provided where one word in a paragraph is changed, (i.e., but to and), the techniques are reasonable and understandable.

In short, I find the recommendations and techniques effective and applicable. In a recent meeting where I was leading a strategic planning team to make some significant organizational changes, I was able to apply several of the recommendations in Nice Teams to increase the effectiveness of the team and redirect it from a stagnating situation. I'll happily add this book to my arsenal of management tools.

PERFORMANCE MEASUREMENT PROTOCOLS FOR COMMERCIAL BUILDINGS

American Society of Heating, Refrigerating and Air-Condition Engineers, Inc.

(ASHRAE), U.S. Green Building Council (USGBC), and The Chartered Institution of Building Services Engineers (CIBSE), Atlanta, GA, 2010, 257 pages, softcover, \$75 ASHRAE member: \$89 nonmember.

hree organizations in the U.S. and . Canada have teamed up to create a protocol to measure the effectiveness of building mechanical and electrical systems. Performance Measurement Protocols for Commercial Buildings provides for three levels of complexity and detail to measure building environmental systems: heating, cooling, ventilation, lighting, noise, and water use. While the focus is on commercial buildings, educational facilities (K-12), residence halls, and other space types typical of colleges and universities are included.

There's a lot in this book. It presents an organization structure to measure a lot of complex systems that make a modern building run. Despite having taken courses in HVAC, lighting, and acoustics, I don't recall seeing any reference that brought all three together in a single evaluation method. Facility owners who hired designers and consultants working under the architect of a new building really didn't have a single system to evaluate the end product after the project was complete, or to evaluate an older facility to identify sustainability or energy conservation initiatives.

There are tables and graphs in both U.S. and SI units covering energy, lighting, heating/cooling, water, IAQ, lighting, and acoustics. Many of these tie to the USGBC LEED metrics allowing for retrocommissioning or recertification of certified facilities. Occupant surveys provide uniform questions and can be tied to large datasets of existing survey results. Finally, there's a reasonable glossary and list of acronyms and an extensive bibliography to provide clarity and supporting material. This book is dense.

Given the challenges of buildings today and our customer demands which seldom relax despite shrinking budgets and increased conservation demands—this book will prove to be a valuable reference. I'll be using my copy extensively to develop strategic plans for future facility renovations and development, as well as to measure the effectiveness of recently constructed facilities. (3)

Ted Weidner is assistant vice chancellor of facilities management & planning at the University of Nebraska-Lincoln; he can be reached at tweidner2@unInotes.unl.edu.



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Compiled by Gerry Van Treeck

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Dyson's Airblade™ hand dryer earned the Carbon Reduction Label from the Carbon Trust. Dyson research found that the manufacture of the new polycarbonate-ABS Dyson Airblade™ produces 50 percent less CO2 emissions than the aluminum equivalent launched in 2007. The Carbon Reduction Label recognizes manufacturers' commitment to the further reduction of their product's carbon footprint - the amount of carbon emissions (CO2 and other greenhouse gases) produced from its materials and manufacture, transport, in-use, and end of life. For additional details about the Dyson Airblade visit www.dysonairblade.com.

KNIPEX-Tools announces the CoBolt Compact Bolt Cutter. For easy, exceptional cutting performance, KNIPEX is one of the best small handheld cutters on the market. With a lever action design that provides 20 times more hand force than traditional bolt cutters, KNIPEX's Compact Bolt Cutter offers superior cutting power with minimal effort. Forged from oil-hardened chrome vanadium electric steel, this 8-inch hand cutter features precision matched, induction-hardened cutting edges that cut through ¼" diameter thickness with ease. For more information, please visit KNIPEX-Tools at www.knipex-tools.com.

Benjamin Moore's newest coating is called Advance, and for this reason: it is an alkyd-based interior paint powered by the brand's Gennex waterborne colorant system. Advance is truly an alkyd, not a hybrid, delivering all of the performance virtues demanded of an oil-based paint, yet has other characteristics common to latex. Advance cleans up with soap and water and is as green as they come, with a low-VOC content of less than 50 grams per liter, well below the 250 to 500 count for most



other alkyds, and with significantly reduced odor. For more information about Benjamin Moore visit www.benjaminmoore.com.

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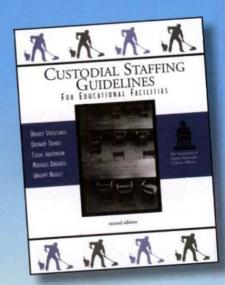
New Products listings are provided by the manufacturers and suppliers and selected by the editors for variety and innovation. For more information or to submit a New Products listing, e-mail Gerry Van Treeck at gvtgvt@earthlink.net.

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PRESIDENT'S REPORT



By Polly Pinney

... after the rain the sun would again shine, and lo and behold, it is peeking through the clouds. "" ast year in Vancouver I stood before you and paraphrased the great Bette Davis in All About Eve, with regard to the economic realities: "It is going to be a bumpy ride." And it has been bumpy indeed. But it has also been an extraordinary ride—a ride I will truly never forget. I also promised that after the rain the sun would again shine, and lo and behold, it is peeking through the clouds.

The Nuts and Bolts

This year brought many accomplishments for our association. Our business models for major programs were recrafted, and the list of creative endeavors mounted to support our revenue process was exhaustive. The diamonds produced by these efforts are impressive.

The BOK Goes Digital!

What an exciting new opportunity for all of us as APPA members! Our Body of Knowledge has been effectively launched in a new and exciting digital, searchable format and is available as an institutional subscription. The 56+ new and updated chapters from the third edition of the Facilities Management manual are now available to any individual at a subscribing institution and have been designed for ongoing timely updates. Many thanks to Maggie Kinnaman and the content coordinators and chapter authors who brought this product to fruition.

Stabilization of APPA's Financial Position

The financial challenges for our association this year have been a mirror of the economy and our own institutions' fortunes. Creative marketing and diligent business planning reduced a pending deficit for FY 2009-2010 significantly, and the Board Of Directors has deployed a conservative budget for FY 2010-2011.

Thought Leaders

First conceived in 2006 by then President Jack Colby, the Thought Leaders Series has become the beacon for the industry and APPA's educational programming as it defines the emerging trends and critical issues for the educational facilities profession. This year we delivered both the 2009 and 2010 symposia keeping, APPA on track and on point for our rapidly changing and emerging profession.

Revamped and Enriched Partnerships

This year we received ASHRAE funding for a CFaR project focusing on the Total Cost of Ownership (TCO). In addition, we launched a partnership with CAUBO, the Canadian Association of University Business Officers, aimed at creating an international opportunity for utilization of APPA's Facilities Performance Indicators survey and reports.

Strengthening Our International Strategic Alliances

Every industry has felt the change driven by a truly global climate. The facilities management profession is no different, and APPA has worked hard to both develop and maintain a large framework of engagement to ensure our presence in the delivery of educational facilities management services worldwide. This year I was privileged to represent APPA at the AUDE annual meeting in Belfast, Northern Ireland, hosted by Queens University Belfast, where I shared APPA's Top Ten Critical Issues for the facilities profession with partners from AUDE, TEFMA, and HEFMA. The striking likenesses and differences in our perspectives, approaches, and technologies are remarkable. The gracious hospitality of our hosts Patrick Finch, AUDE Chair, and Gary Jebb and his conference team was greatly appreciated. The facility profession worldwide and our impact on this profession are critical to our future as an organization, and our alliances are the ladder to our future internationally.

Programmatic Improvements

This year marked an update and revamp of the criteria for the Facilities Management Evaluation Program (FMEP) and the Award for Excellence, which realigned these important facilities management organizational assessment criteria with Baldrige quality criteria. And, I am truly pleased to report that we posted a measurable increase in certification participants by cresting the 100 mark (146 EFP graduates and 20 CEFP graduates), and a 74 percent increase in the FPI survey participation, largely due to an enhanced survey and outcome report documents.

Regional Meetings

This year it was my privilege and pleasure to visit four of our six regions and attend their annual meetings. What a rich learning experience! The opportunity to celebrate each of the regions' accomplishments and sample the diverse flavor of each was wonderful! RMA in Tucson, Arizona was a true southwest fiesta focused on Learn, Lead, and Influence. Sessions focused on mentoring, developing our future leaders, the importance of leadership training, and leadership during change, all set in the beautiful Sonoran desert landscape. My thanks and congratulations to Eakle Barfield and to Chris Kopach and his conference team for a world-class conference.

Then it was on to ERAPPA set in picturesque Portland, Maine where we were all encouraged to imagine. This multi-track endeavor had topics on sustainability, facilities planning, people topics, and utilities and energy. My thanks to Keith Woodward, Dan Gearan, and the entire committee for a truly splendid event.

On to PCAPPA in Hollywood, California for a truly star studded affair, Lights, Camera, Action!, set within walking distance of Universal Studios. One of the more interesting educational approaches was the team-building activity at the Universal Studio lot where we teamed up to produce commercials. My thanks and congratulations to Mark Hunter, Ben Elisondo, and their conference team. It was magical!

As the tour of the regions came to a close I made my way to Daytona Beach for SRAPPA and a Race to Green, heavily focused on campus sustainability. Sessions on going green while staying out of the red, water conservation, greening restoration projects, and carbon neutrality were joined with a trip to the Daytona Speedway Experience and the Johnson Space Center. My thanks to John Malmrose, Dan Young, and their conference committee for a high-speed thrill!

At each of these annual meetings I was privileged to meet with the regional board, garner new acquaintances with members, and share some of the regions' issues and concerns. It was an educational and deeply rewarding experience and better prepared me to fulfill my role as APPA President.

Final Thoughts

As my term of office draws to a close I must recognize the incredible people with whom I have shared the privilege of serving. Our APPA staff is amazing. They do so much with so little in so many ways. Their creativity, diligence, and love for the profession impress me daily. In addition, I was blessed with a great Executive Committee, a dedicated and thoughtful Board of Directors, and a group of committees who love this association as much as I do and have worked diligently to help it survive and thrive. I am truly proud of what we have accomplished together.

And to the group of individuals who have supported this effort with their dedication—my ASU team—I say a hearty thank you and well done! These are the folks who served APPA by giving their support, encouragement, and dedication so that my service was possible.

And lastly, my thanks to Lander Medlin. Our journey both professionally as colleagues and as friends began many years ago in service to APPA at Notre Dame. I will never cease to be amazed and impressed by her energy, dedication, professionalism, and true passion for this organization.

It has been a magnificent experience this year. Last summer I wished for you the following: "May your horizons hold the treasure of diamonds, polished and brilliant." I can truly tell you—mine certainly has.

May your horizons hold the treasure of diamonds, polished and brilliant.

IMMEDIATE PAST PRESIDENT



By William M. Elvey

am pleased to report on three major activities that I have participated in during the past six months: (1) Attendance at the 2009
HEFMA Annual Conference; (2) Attendance at the MAPPA 2009 Educational Conference and Annual Meeting; and, (3) Serving as the Chair of the Nominating Committee for the 2010 - 2011 APPA Officer Elections.

Goal 1 of the existing Memorandum of Understanding (MOU) between APPA International and The Higher Education Facility Management Association of Southern Africa (HEFMA) is to foster a commitment of collaboration by our respective organizations and our members to more effectively serve the facilities management profession in the North American and Southern African areas. In the recent past the Past President of APPA has been able to attend the HEFMA Annual Conference and this year was no different.

HEFMA 2009 was held October 19-23, 2009 at Rhodes University in City of Grahamstown, South Africa. The conference theme was "Sustaining Facilities Management in a Changing Environment" - this certainly sounds familiar doesn't it? Marcel Theron, HEFMA President, Deputy Director, Facilities Management at the University of Pretoria, South Africa and his team including Les Reynolds, Facilities Director at Rhodes University and Chair of the Organizing Committee, did an outstanding job of creating an interesting and entertaining event that has generated memories and friendships that will last a lifetime. Approximately 75 people from 18 member institutions, including 15 from South Africa, attended the conference. The leaders of our international strategic partners from the Association of University Directors of Estates (AUDE) of the United Kingdom and the Tertiary Education Facilities Management Association (TEFMA) of Australasia also attended HEFMA 2009.

The venue was quite different than one would expect as compared to a regional or APPA International meeting in that all of the attendees attended every educational session. A total of 15 educational sessions were held covering topics ranging from "Universities and Sustainable Building Heritages" to "Geographic Information Systems Assisting Maintenance Sustainability" to "Energy Efficiency in South Africa." Not surprisingly, all of the topics presented correlated highly with many of the same issues challenging the educational institution facility managers represented by APPA. Each international

association representative was also requested to give a presentation. The topic of my presentation was "Addressing the Maintenance Challenges of American Universities" that emphasized the role and importance that an association such as APPA can play in helping educational facilities managers meet today's many challenges. Social events included a visit to a local wild game farm for a tour and some local African cuisine, a visit to Summerhill Farm, a big pineapple farm where we also enjoyed an evening of entertainment and traditional food, and a gala dinner event and awards banquet. I am grateful that I was able to represent APPA at the HEFMA 2009 Conference and want to extend a hearty thanks to Marcel Theron for the hospitality received and to all those who helped make the event a success.

Another responsibility as Immediate Past President is to be able to represent current APPA President at one or more of the fall regional meetings. This year I was asked by President Polly Pinney to attend the MAPPA 2009 Educational Conference and Annual Meeting held September 27-30, 2009 that was hosted by the University of Iowa.

MAPPA 2009 was extremely well organized and a first-class event in all respects-from the time I registered to attend—all the way until the end of the President's Banquet. MAPPA President John Ott, and Don Guckert and Jeri King and the rest of the Host Committee from the University of lowa, should be especially proud of their accomplishment. Despite the hard times of the national economy, over 300 persons still attended this regional conference. Some 29 different educational opportunities were presented including several "On-site Learning Experiences" such as "Power Plant, the Flood, and Alternative Fuels," "LEED Building," and "Flood Recovery and Mitigation." One of the personal highlights for me was being able to administer the Oath of Office to MAPPA's incoming Officers and also personally recognize Kris Ackerbauer, one of the five recipients of the APPA 2008-2009 "Unsung Hero Award" that was given by me in lieu of the more traditional President's Awards at APPA 2009 last July in Vancouver, British Columbia.

The final major activity, and also a major responsibility of the Past President, is to act as Chair of the Nominating Committee for recommending a slate of candidates for the APPA 2010 - 2011 year. The rest of the Nominating Committee consists of the Senior Representatives

of the APPA Regions. I trust that everyone is pleased with the results of the committee's work. Please allow me to thank the senior regional representatives for the timeliness and thoroughness with which they carried out their Nominating Committee responsibilities.

It has been my honor to continue serving APPA this year as your Immediate Past President. I now conclude my tenure of serving APPA on the Board for six of the last seven years.

PRESIDENT-ELECT

et me begin by saying how honored I am to serve as APPA's President-Elect. I found out how well the APPA leadership system works by having a chance to learn first hand from great people like APPA Presidents, Polly Pinney and Bill Elvey. The year of orientation has allowed me to hit the ground running when I took office in July.

The past year has been both exciting and challenging. During September 2009, I had the opportunity along with my wife Jane to represent APPA in the countries of Singapore, Australia, and New Zealand, while attending the 2009 Tertiary Education Management Conference (TEMC09) in Darwin, Australia. Before attending this conference I gave a presentation to the APPA Singapore Chapter hosted by the National University of Singapore. The title of the presentation was "Integration of Sustainability and Energy Efficiency in Facilities." At the TEM Conference I gave a presentation to the TEFMA Board and offered a presentation to conference attendees on the topic of "Key Issues for Facility Professionals." I was also able to take extensive tours of several colleges and universities in all three countries. I sincerely appreciate the opportunity to represent APPA on this international tour as it was rich both culturally and educationally. Jane and I developed many lasting friendships and professional relationships with educational facility professionals from Singapore, Australia, and New Zealand while supporting APPA's Vision, "To become a Global Partner in Learning" as well as its Mission, "To support educational excellence with quality leadership and professional management through education, research, and recognition."

It is my resolved belief that it is essential to APPA's strategic plan to continue to reach out to our global educational facility management community. And, it is my hope that a good number of the things accomplished last September will place APPA and its international partners in a better position financially, while providing greater educational, networking, and professional development opportunities for its members.

When I developed my platform for the position of APPA President-Elect, my commitment to you as APPA members was to serve APPA with the following objectives:

- Provide continuing support for the development of the APPA 7 Key Strategies as they are the foundation of our transition and growth.
- Promote alignment with international, regional, state, and local chapter organizations as vital to APPA's role as a leader in the facility management arena.
- Expand the availability of programs that engage young facility management professionals.
- Survey the membership to determine the areas of greatest needs and the type of program delivery needed.
- Evaluate the content and delivery of existing programs to ensure they are affordable, accessible, and focused on current issues, while making appropriate use of innovative delivery technologies.
- Develop new and innovative training and workshops that can be delivered at the regional, state, and local chapters.



By Darrel W. Meyer

... it is essential to APPA's strategic to reach out to our global educational facility Many of these objectives are being addressed thanks to the leadership of President Polly Pinney. In February of this year the APPA Board reviewed an implementation strategy necessary to successfully achieve the following four major objectives:

- To increase membership particularly in underserved areas such as Community Colleges: K-12 schools, and HBCUs and to arrest renewal losses stemming from the global economic
- Identify new revenue sources and implement new business plan approaches in the delivery of our present high-quality programs, publications, and services.
- To expand the reach of APPA's services by redefining the organization's marketing approach.
- To enhance opportunities for strategic alliances, thereby increasing APPA's visibility and influence within the educational community.

Over the past few months - under Polly's guidance, hard work from the committees and help from an incredible APPA staff - these implementation strategies along with an integrated marketing plan are being finalized to guide the APPA over the next few years.

During the past year many people have inquired about the theme for the APPA presidency for the year 2010-2011. After a year with Polly Pinney's theme of Honing the Brilliance, it seems appropriate to concentrate on Investing in Your Future for the upcoming year. APPA's greatest resource is its diverse membership and the vast amount of knowledge associated with them. It is an organization that exists for its membership and as such should strive to provide the resources for members to identify and take full advantage of their potential as facilities professionals.

As APPA President I plan to focus on the critical challenge of the economic crisis that facility professionals are facing today, and promote the need to expand the availability of programs that would engage young facility management professionals, create programs that encourage synergy among the international, regional, state and local chapters, and develop a strong membership recruitment initiative. Already an APPA Regional Relationship Task Force has been formed that will define and identify joint international APPA-regional association goals with regard to mission and roles, program content and delivery, and overall leadership development. Another initiative that has already begun is a group that will strive to increase membership in underserved areas such as community colleges, small colleges, K-12 schools and HBCUs and look at ways that APPA can better engage these institutions.

It is more important than ever for APPA to be resolute and continue to develop programs based on its strategic plan in these uncertain economic times. Facility professionals need to provide new and effective leadership now more than ever. The broad impact of facilities on an educational institution's success provides an unprecedented opportunity for facility professionals, and also a new skill set of opportunities. APPA must take the leadership role in identifying the most critical facility issues and quickly respond with focused and targeted initiatives that will provide members with the resources they need and demand.

Finally, I look forward to serving as your APPA President during this next year of Investing in Your Future. This is a favorite quote of mine from a Hallmark book called No Limits But the Sky:

Climb high, climb far, your goal the sky, your aim the star.

Perseverance is the investment. Success is the return.

SECRETARY-TREASURER

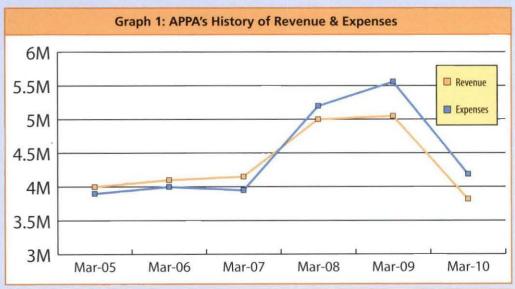
he global economic downturn continues to negatively impact APPA's financial situation. Indeed, in the fiscal year ending March 31, 2010 we posted a deficit of \$368,066 in the operation (exclusive of the appreciable gains in the long-term equity investment up by \$112,687). We experienced a reasonable number of registrants for our face-to-face educational programs given the economy's impact on educational institutions' budgets. Revenue and expense shortfalls from the APPA 2009 conference, publications, and job advertising sales also contributed to this deficit. The regions' decision to fund the committee and Board of Directors meetings was significant and did not go unnoticed as we collaborate together to weather this economic storm. In addition, we are continuing to refocus and recalibrate all professional development programs and their delivery for this fiscal year (2010-2011) to achieve a balanced budget.

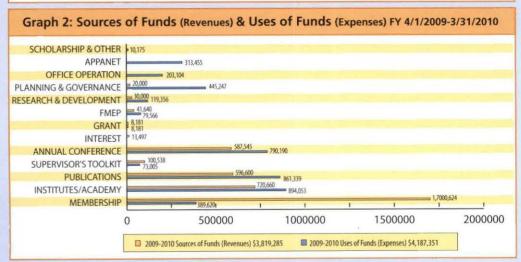
As expected, over half of our reserves have been used for this "rainy day" situation resulting in reserves presently totaling \$345,000. Our equity investment recovered significantly from the prior year's stock market crash. Adjustments in income streams and expenditures have been made to balance such losses in the coming year. The APPA headquarters building was assessed at approximately \$2.1 million in February 2010 by the City of Alexandria, and the building is fully paid.

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 reflect the direct cost of membership department salaries and 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 production of Facilities Manager



By Nancy Hurt





APPA welcomed more than 20 new institutional and affiliate members during the 2009-10 membership year. 39 magazine and the direct cost of many APPA activities such as the website and database management; and a portion of research and development, 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 spiked reflecting a gain of \$112,687 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 reassess our investment policy to stabilize such fluctuations and their resultant impact on our financial situation and cash flows.

We are all experiencing tough economic 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 all prepare for the busy new academic year at our institutions, it is an excellent time to recognize the dedication and hard work of everyone involved in membership activities this year, including individual members, the Board, Membership Committee Representatives, and the APPA staff.

APPA, like many of our institutions, has faced the challenges and opportunities presented by the economy. This year we experienced significant loss in the number of institutional and business partner members. Anecdotal information indicates the economy played a large part in this loss. Staff, international and regional committee members, international and regional board members, as well as consultants, all pitched in as a combined group making hundreds of contacts via phone and e-mail in order to ensure as many membership renewals as possible.

Even with the downturn in the economy, economy and the challenges of membership renewal, APPA welcomed more than 20 new institutional and affiliate members during the 2009-10 membership year. Many of these new members cited access to APPA programs, such as

Professional Development, FPI, and Certification as reasons for joining.

The Membership Committee is working on new recruitment initiatives focusing on membership benefits. We continue to brainstorm ways to enhance our membership categories to ensure inclusion and engagement of the full spectrum of educational facilities professionals. We remain steadfastly behind the vision that APPA International and its regions are a resource and community in both good times and bad.

Success in the membership area is not possible without the dedication and hard work of all of us: members, staff, and Board members. I extend my sincerest appreciation to all who contributed the all of the recruitment and retention efforts this year.

Bylaws Committee

This last year, the Bylaws Committee recommended a number of Bylaws changes to the APPA Board of Directors, which were passed at the February 6, 2010 Board Meeting. The Bylaws changes passed by the Board include:

- Language changes to provide consistency in terminology throughout the Bylaws.
- Modification of the Affiliate Member description to make the membership organization based.
- Clarification language in the International Member description to make it clear when and how an International Member may associate with an existing region.
- Removal of the requirement for Educational Institution Associate members to be full-time employees.
- Clarifications to the appointment of at-large members to the Board to make the Bylaws consistent with practice.
- Additional language to provide for installation of association officers in the event an annual meeting is not held.

Thank you to the entire Board, including the incoming regional representatives, for their thoughts, insights, and perspectives as we worked on these changes.

In closing, I would like to applaud the hard work of the APPA staff this last year. As always they provide exceptional support for our organization. We are fortunate to have these dedicated individuals as a part of our team.

VICE PRESIDENT FOR INFORMATION AND RESEARCH

here have been significant accomplishments by the Information and Research Committee and APPA staff during the past year despite the challenges posed by the economic downturn. Although we were obligated to scale back or shelve some initiatives because of limited resources, we were also forced to critically appraise many of our services, programs, and offerings. This allowed for an opportunity to reflect on how these services, programs, and offerings are marketed, delivered, and utilized by members.

FPI Survey/Report

First of all, we offer a big thank you to all of the institutions who participated in the Facilities Performance Indicators survey this year. Granted, for those who participate for the first time, it can be a somewhat daunting task, but it becomes much easier in subsequent years. The benefits of participating are numerous: helping you to make the business case for your facilities needs, compare and contrast your facilities operations with other institutions, and create a balanced performance scorecard based on critical data findings.

In the past years, there has been a modest increase in participation in the survey, but during this survey cycle, we needed to temper our euphoria, as participation almost doubled (actually increased by 74 percent from 225 to 392). We do not anticipate losing traction because both the survey and the report continue to improve. These are a few of the 2008-2009 report enhancements: (1) APPA released the unpublished Report as a beta version for all participants to view and verify accuracy of the submitted data, (2) Trending on all charts and graphs have been extended from three to five years, (3) The restriction of selecting only three institutions to compare data has been lifted to allow viewing up to 100 participants. and (4) The Executive Level Presentation has more functionality this year. The charts can be exported into Excel, PowerPoint, or Word programs.

BOK, CFaR Projects, and Books

BOK

APPA's Body of Knowledge is now available in a searchable, digital database. It updates and builds upon the contents of *Facilities Management:* A Manual for Plant Administration. Editor-in-Chief Maggie Kinnaman led an Editorial Board in this latest revision. Many BOK chapters have been added or updated since it was launched in November 2009. Currently, there are 56+

chapters in the BOK with nearly 200 subscriptions sold to date. The Editorial Board plans to do annual chapter reviews starting in 2011.

Center for Facilities Research

The CFaR projects recently completed are: (1)
Development and Application of Policy Based
Tools for Institutional Green Buildings by Tony
Cupido (McMaster University), and (2) National
Campus Safety and Security Project – Findings and
Contributions by Bill Elvey (University of Texas,
Dallas). Projects currently in process are:
(3) Relating Performance Indicators with
Sustainability by Greg Adams (University
System of Georgia), (4) Managing Key Human
Resource Issues: A Study of Educational Facilities
Professionals in Institutions of Higher Education by
Shelley Price—Finn (Saint Mary's University), and (5)
Implementing Total Cost of Ownership by Doug
Christensen (Brigham Young University).

Books

Publication sales are going well with the newly published *Strategic Capital Development* by Harvey Kaiser and Eva Klein (also a CFR project) Updates and revisions are planned for the Staffing Guidelines Trilogy (grounds, custodial, and maintenance) led by Editor-in-Chief Alan Bigger.

Marketing/Communications

Norm Young is chairing a subcommittee on Marketing/Communications that is exploring additional options to market APPA's programs, services, and offerings. The M/C Subcommittee will focus on effective strategies for marking FMEP, BOK, and APPA 20xx. The initial focus of this group is on the FMEP: (1) To make recommendations for improving the program, (2) To highlight the ROI generated from participating in the program; (3) To identify problems that FMEP can solve. The subcommittee will then engage in a similar exercise for the BOK and APPA 20xx.

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 Wiens, RMA; Jeff Brown, CAPPA; Richard Storlie, PCAPPA; Maggie Kinnaman, At-Large; Darryl Boyce, At-Large; and Steve Glazner, APPA staff liaison. A special expression of gratitude to APPA staff supporting the L&R Committee: Christina Hills and Anita Dosik.



By Randolph Hare

These times call for effective leadership that is innovative while still being practical.

VICE PRESIDENT FOR PROFESSIONAL AFFAIRS



By David A. Cain

his was an exciting and busy first year as Vice President for Professional Affairs. The hand-off from Kevin Folsom, previous Vice President, was seamless and more than I could ask for. He continues today to support both me as a mentor and continues to chair the Code Advocacy Task Force. It has been my privilege and honor to serve and work with the four main committee groups, the Professional Affairs Committee; Awards and Recognition; Code Advocacy Task Force; and liaison to the Certification Board.

While I had been a working member of the Professional Affairs Committee for several years, I was unable to appreciate the amount of work that the leadership position required. Therefore I am absolutely grateful for skillful guidance from John Bernhards, APPA's associate vice president and the liaison to Professional Affairs. The support received from John and the APPA staff has been outstanding and more than I could have wished for.

I would also like to acknowledge the committee membership; listed below are the individuals that represent the different regions within Professional Affairs. These individuals deserve our praise for their loyalty and dedication to APPA in delivering these awards. I can't thank these facilities professionals enough for all their effort and hard work this past year! Kudos and job well done to the committee members below.

Professional Affairs Committee

CAPPA: David Gronquist
ERAPPA: Willy Suter
MAPPA: Greg Fichter
PCAPPA: Tony Ichsan
RMA: Jeff Butler
SRAPPA: Jodie G. Sweat

Awards and Recognition Committee

CAPPA: Art Jones
ERAPPA: Joseph Rubertone
MAPPA: Jerry Carlson
PCAPPA: Anthony Guerrero
RMA: Christopher M. Kopach
SRAPPA: Dan Batson

Code Advocacy Task Force

Chair: Kevin Folsom Mike Anthony Brooks H. Bak Richard Davis

Mike Anthony Brooks H. Baker Richard Davis David Handwork Terri Konchesky

Professional Affairs Committee:

Effective and Innovative Practices/ Award for Excellence Awards

Among the core responsibilities of the Professional Affairs Committee is the review of nominations and selection of institutions receiving the APPA Effective and Innovative Practices Award (E&I), and the Award for Excellence in Facilities Management (AFE). This year 25 submissions from 19 institutions were received, with five E&I awards presented. Five AFE applications were received, with two institutions receiving APPA's highest acclaimed award.

- California State University Northridge (Student Design Team Program)
- 2. Purdue University (Building Services Sustainability Program)
- University of Iowa (University of Iowa Energy Hawks)
- University of North Carolina, Charlotte (Take It or Leave It Tour/Recycling Program)
- University of Southern California (Maintenance Parts and Materials Process Reengineering)

Please congratulate the institutions that were recommended to the APPA Board for the Award for Excellence:

Arkansas State University (ASU) University of Nevada/Las Vegas (UNLV)

Awards and Recognition Committee

The Awards and Recognition Committee (A&R) is responsible for reviewing and approving individual nominations for the Pacesetter Award; the Meritorious Service Award, and the APPA Fellow designation. There were three Meritorious Service Award submissions, eight Pacesetter Award submissions, and two Fellow awards submissions. Please congratulate the following individuals – all of whom are well deserving of these prestigious awards:

APPA Fellow

Maggie Kinnaman, Emeritus Member, formerly of the University of Maryland, Baltimore Dr. Mo Qayoumi, California State University-East Bay

2010 Meritorious Service Award

Kevin Folsom, Dallas Theological Seminary Mary Vosevich, University of New Mexico Norman Young, University of Hartford

Pacesetter Award

Ben Elisondo, Skirball Cultural Center Daniel Gearan, University of Southern Maine Kristie Kowall, Illinois State University Viron Lynch, Weber State University Juan Ontiveros, University of Texas/Austin Matt Taylor, University of North Florida

Code Advocacy Task Force

The charge of the Code Advocacy Task Force is to keep the APPA membership informed of upcoming code issues and serve as a liaison to APPA of all code and regulations that impact educational institutions. Under the advisory leadership of Kevin Folsom the task force reviewed proposals and contributions submitted by members of the task force to the National Fire Protection Association's standards committee and supported the following alterations to existing NFPA codes, resulting in potentially lower costs for educational institutions:

NFPA 72 (Fire Alarm Code) NFPA 25 ("Sprinkler System Code") NFPA 20 ("Fire Pump Code") NFPA 70 ("2011 National Electrical Code") NFPA 1 ("Fire Code"/Emergency Power Systems)

Certification Board Liaison

As the Vice President for Professional Affairs I also serve as the elected officer liaison to the Certification Board. In this capacity, I am able to collaborate with the board members to ensure their activities align with the continued overall goals and mission of APPA. The leadership of the Certification Board, under the current direction of Jack Colby, continues to ensure this critical effort reaches the facilities professional aspiring to advance in their career. The APPA staff, with the support of the Certification Board, is fully committed to the continuing growth of the Educational Facilities Professional (EFP) and Certified Educational Facilities Professional (CEFP) into our educational environments.

VICE PRESIDENT FOR PROFESSIONAL DEVELOPMENT

igher education facilities professionals are now thoroughly entrenched in the new economic realities of their institutions. For most, there is a continuous call to do more with less in some mixture of meeting the existing expectations for the current facilities and infrastructure; planning for and constructing new facilities; increasing regulatory and compliance activities, etc., while also dealing with reductions in operating and capital budgets. The situations are often compounded by administrative challenges such as staff reductions (voluntary and/ or involuntary) and workforce demographics.

While every institution seems to be dealing with many of the same issues, no two seem to be exactly alike. They each have different DNA coupled with a different combination of needs, constraints, and opportunities. APPA maintains its mission-oriented belief that professional development for the facilities professional is essential - especially when it is on target and timely.

These times call for effective leadership that is innovative while still being practical. APPA's Professional Development Continuum is designed to assist its member institutions in addressing their needs by providing useful information,

defining a roadmap for success, and imparting the principles and skills required to be the effective leader. This process is supported greatly by the benefits that come with the many formal and informal networking opportunities with other member institutions.

APPA has a proven track record of great programs that support the training and development needs for each level of a facilities professional's career. This includes offerings to improve both the technical skills and the people skills required to be effective. The quality of this past year's programs was no exception. The Institute for Facilities Management and Supervisor's Toolkit are highly rated and continue to be in high demand. In addition, the Leadership Academy, the Thought Leaders Series, and the SFO Summit received excellent evaluations from the attendees and beneficiaries. The Professional Development Committee works with the appropriate people within each program to review and assess the value delivered to the members and participants.

APPA wants to complete the educational experience by enhancing the programs and continuing to seek out the best thinkers and best practices from all business areas and industries, refine the best ideas, and incorporate them into



By David Gray

its program offerings. The Annual Conference is a great example of such an opportunity. There are opportunities to employ technologies (such as Web casts/webinars, etc.) that could prove to be attractive to younger professionals, be costeffective 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 we understand the importance of alignment with our regions and chapters. The programs that each of these regions/chapters can offer will allow for the ongoing success of the overall Professional Development Continuum. APPA will continue to leverage the work of the regions/chapters to provide a continued balance of offerings from the entry level professional to the Senior Facilities Officers of our organization.

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: Doug Greenwood (MAPPA), Dana Peterson (ERAPPA), Doug Riat (CAPPA), Shawna Rowley (RMA), Kathleen Scheduler (PCAPPA), Tony Yamada (SRAPPA)

Institute Subcommittee: Jay Klingel, Subcommittee Chair, Lynne Finn, Don Guckert, Mary Vosevich

Academy Subcommittee: Doug Christensen, Subcommittee Chair, Matt Adams, James Cole, Jack Hug, Ann Jenkins, David Judge, Gary Reynolds, Lander Medlin, Glenn Smith, Tom Stepnowski

APPA 2010 Subcommittee: Doug Riat, Chair, Polly Pinney, President, Bill Elvey, Immediate Past President, Darrel Meyer, President-Elect, Dave Button, Randy Ledbetter, Keith Woodward, Randolph Hare, Neal Lespasio, Welcome Committee Host

Certification Board: Jack Colby, Chair, Erin Babson, David Cain, Phil Cox, Jim Roberts, Jim Whittaker

Thought Leaders Chair: Jack Colby

I also want to thank the APPA staff for its support and especially Suzanne Healy, director of professional development, and Katherine Theranger, professional development and certification manager. Finally, I want to recognize Glenn Smith as he assumes the responsibilities as Vice President for Professional Development. He is a proven professional bringing excellent qualifications and experience to the position, and I know he will serve APPA and its members well.



By E. Lander Medlin

EXECUTIVE VICE PRESIDENT'S REPORT

hese remain uncertain economic times for all sectors of the economy let alone education - locally, nationally, and globally. Although public perception of the value of a college education remains strong, it too is under attack. All told, the global economic downturn has eclipsed all other factors contributing more significantly than ever to the funding challenges we all face at our institutions.

APPA is no different. Certainly, the impact of these economic challenges on your budgets and your ability to travel remains severe and beyond anything we could have imagined. For example, participation in educational programs remains down by 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. This situation necessitated a reduction in our workforce similar to what many of you have or are experiencing. Therefore, we will post another sizeable year-end deficit of \$357,000. Revenue and expense shortfalls continued with the APPA 2009 conference in Vancouver, losses in institutional membership, the natural resultant drop in member attendance at various educational venues, and the negative impact of hotel contracts signed and sealed years ago. Although cash outlays for the development and execution of the certification program were significant, development of both credentials is complete and we are slowly seeing a return on our investment. Early completion of the 7 Key Strategies was critical in setting us up with a focus on the future with products and services you need now. Our operating reserves remains at \$245,000 went to service this untimely "rainy day" situation

experienced during the past couple of years. On a brighter note, we do own our headquarters building outright valued at \$2.1 million.

We are all (volunteers and staff) working 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 such 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.

The clarity of focus and direction from completion of the strategic plan's 7 Key Strategies has sharpened and crystallized ways to increase value to our members that are both tangible and intangible. 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, execution of the 7 Key Strategies is 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. Most notable is the launch of the digital BOK (Body of Knowledge) updating and replacing the Facilities Management: A Manual for Plant Administration. There are 56+ chapters available at a small institutional-based subscription rate of \$199. This gives any and all individuals at your institution full access (24/7) to this wealth of information. In addition, your resource library should include the Web-based 2008-09 Facilities Performance Indicators (FPI) and dashboards and our newest books Strategic Capital Investment, The Green Campus, and the significantly revised edition of the Environmental Compliance Assistance Guide (published in collaboration with the Campus Safety Health and Environmental Management Association-CSHEMA) along with Buildings. . . The Gifts That Keep On Taking: A Framework for Integrated Decision-Making Leadership in Educational

Facilities Administration, and Stewardship & Accountability in Campus Planning, Design & Construction. Further, it is noteworthy that our FPI data, ratios, and benchmarks are being used more widely than ever before. Several large higher education systems and associations like CAUBO 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 continue work on an international benchmarking project. 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 valuable 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; and the APPAinfo list that boasts over 1,050 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 two dozen research projects have been completed to date.

Finally, as part of our strategy to expand knowledge and research, APPA, with sponsorship from Haley & Aldrich, delivered its fourth annual Thought Leaders Symposium (TLS) for 2009 and, the fifth was delivered this past April 2010 through the generous support of UGL Unicco. In essence, a group of key higher education stakeholders consisting of chancellors, 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. The specific trends in higher

The clarity of focus and direction from completion of the 7 Key Strategies has sharpened and crystallized ways to increase value to our members... 33

... provide
members with the
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development and
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needed to compete
and collaborate
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in today's
environment. **

education and the top ten critical facilities issues for fiscal years 2006, 2007, 2008, and 2009 are published as monographs and have been disseminated to facilities professionals and senior institutional officers. The fourth (2009) Thought Leaders Symposium, focused on the criticality of energy and sustainability in higher education, and the impact of the economy on both these major trends. Visit our website for your free PDF downloadable copy.

It is just this 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 and podcasts 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 conveniently 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 virtual deliveries. The visibility and exposure is unbeatable.

Of particular note is the complete reformulation of APPA's annual conference (now simply called "APPA 20xx"). We have featured best-of-breed panelists and speakers who will focus on the future solutions to our most pressing issues. The enhanced framework consists of several general plenary panel sessions, followed by 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 are again delivering a distinct and successful program strictly for senior facilities officers called the Senior Facility Officers Summit. These two educational programs along with our Institute for Facilities Management (offered twice yearly in September and January), the Leadership Academy (offered as a separate delivery next April and as a co-locate with the Institutes this coming fiscal year), 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 has developed and executed a certification program comprising two credentials. The first credential is a knowledge-based credential called the EFP (Educational Facilities Professional) targeted to the younger, less experienced educational facilities professional. A preparatory course is now delivered regularly and in conjunction with our major educational offerings, at the regional conferences, and local areas for a number of institutions. As a result, close to 150 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. Over two dozen individuals have received the CEFP designation. 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. You can take the preparatory course through an online webinar delivery and sit for the exam right at your institution. For more information visit the certification section of the APPA website today.

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 and HEASC (Higher Education Associations Sustainability Consortium) are expanding the collective knowledge and network for institutional sustainability programs. The joint ACUHO-I/ APPA Facilities Conference remains a successful program offering for both the campus housing and facilities professional. This program is offered annually each fall. The Women's Leadership Institute is offered collaboratively each December by a dozen higher education associations. In addition, we have targeted K-12 schools through the Virginia Schools Plant Management Association (VSPMA) for delivery of the FPI, Toolkit, and our certification program. Our institutional efforts remain strong through our institutional strategic alliance agreements.

Thanks to the funding received from ASHRAE we have launched a huge research project focused on the Total Cost of Ownership (TCO) which will engage members, organizations, and associations across the entire field of facilities management. These strategic alliances and partnerships help APPA leverage its resources to provide costeffective, 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. We have just begun work with the Department of Energy (DOE) to help 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 (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. The task force is presently aligned under the duties and responsibilities of the Vice President for Professional Affairs. CATF established a "standards portal" for our members available via the APPA website. The group has already successfully advocated a variety of positions with the NFPA, NEC, and ASHRAE thereby avoiding additional costs and/or saving educational institutions thousands and 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.

The clarity of APPA's brand purpose "to transform the educational facilities professional into influential leaders who, in turn, create 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 where 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 for continuous institutional improvement. We appreciate the value you place on your membership in APPA.

Through the vast array of educational offerings, print and electronic information, research, and 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.

Our commitment products, and services the facilities professional's unparalleled... "

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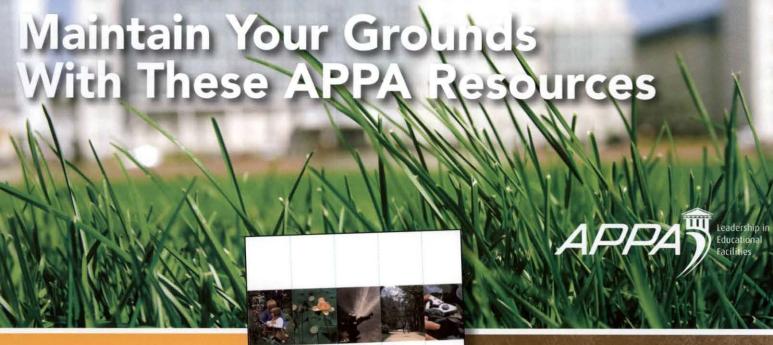
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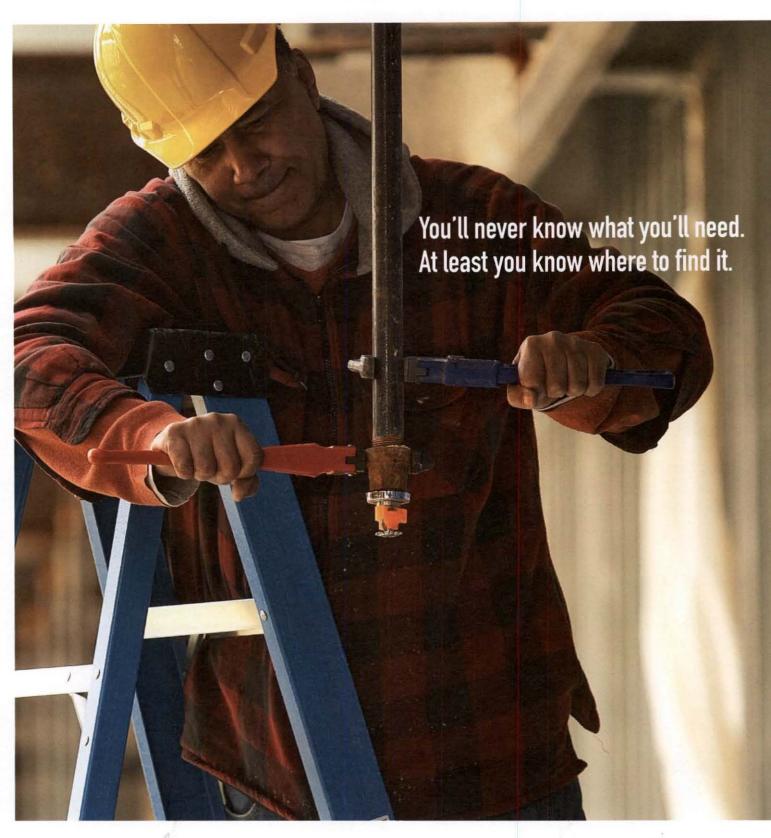
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