

FPI 2.0

Facilities Performance Indicators

Welcome to the 2019-20 Facilities Performance Indicators (FPI) Survey. We are excited to showcase the new look and feel of FPI 2.0 and we hope that our FPI participants will agree that this survey format allows for greater ease of data entry. We will be continually looking for ways to improve and optimize this survey year to year, so feel free to share your feedback and improvement ideas with [Christina Hills](#), APPA's Director of Credentialing & Benchmarking.

FPI 2.0 will appear "lighter" than the previous version and there are two reasons for this. 1) We did remove a number of questions we felt were no longer relevant to continue using because peer comparison data was of little value/use and/or participation in these areas was too sparse to warrant continuing this effort to collect data year over year. 2) Due to this new survey format, we were able to greatly streamline the way we present questions to participants.

As part of this effort to streamline, you will no longer see the definitions laid out in the question set. Instead, you will now need to hover over each question and section topic to view the full definitions. Your prior year responses have still been recorded but they are no longer a hyperlink below the current data input field. Instead, the prior year data is shown in just a few questions above the current data field as a previous response that you can copy and paste. The bulk of the prior year data set is shown DIRECTLY in the current year data field. We understand that this may be confusing but it is the only way we were able to provide you with prior year data. We will most likely have a better system in place next year once we record this initial year of data on the new survey platform. Also, we have no way to produce a PDF of your prior year responses. If you require a PDF of your prior responses, you must request this from [Christina Hills](#). Lastly, we're asking each of you with prior year data auto-populated in the question fields to double check and verify that the data is correct. For example, you will see detailed responses as well as lump sum data. You will need to confirm that both the detailed responses and the sum fields match. You can also overwrite the prior year data easily.

We no longer offer the Live Reports to view and we are not able to allow for assignment of modules. The survey administrator receiving the Institutional ID to unlock this survey is also responsible for safe keeping this survey link on campus. This means that you are responsible for distributing this link to others if you wish for them to have access to the entire survey. In order to provide access to others on campus, you will need to share your institutional ID number that was provided to you by APPA.

Once the survey is submitted, you may re-enter and access the survey again to make any necessary changes. We are currently expecting to close the survey in mid to late February but we may extend this deadline. Once you submit your survey, you will receive a downloadable file of your survey responses. This will be your only opportunity to have a record of what you submitted and we strongly encourage you to save this file as a PDF or Word document etc.

If you have any questions while completing this survey, please contact Christina Hills at christina@appa.org

Registration

Registration Module

Before we can unlock all seven (7) survey modules, we require completion of the Registration module. This module contains nine (9) simple questions and should take only a minute or two to complete. Once you have successfully completed the Registration module, all additional survey modules will be accessible to you via a Table of Contents. The Table of Contents menu will be located at the bottom of each survey page and in the top left hand corner of each page as well (look for the hamburger style menu).

1. Auxiliary Designation:

Please select whether you will INCLUDE or EXCLUDE auxiliary services throughout this entire survey. You will need to choose one option and ensure every survey response field is consistent with your designation. If you decide to change your auxiliary designation, you will need to adjust every survey response field as well.

- include auxiliary services
- exclude auxiliary services

2. Select all the individual auxiliary areas you will report out on in this survey. Providing this information will help others who also elect to include auxiliary services better understand which type of auxiliaries their peers may be reporting out on etc.

Residence Halls/Dorms

Dining/Food Services

Athletics

Parking

College Stores

Student Health Centers

Security/Public Safety

Transportation/Fleet Services

Other

Other

Other

3. Is your institution located in Canada?:

- Yes
- No

4. Indicate whether your survey entries will be submitted in US Dollars or Canadian Dollars (modify from default option if necessary):

- US Dollars
- Canadian Dollars

5. Indicate whether your survey entries will be submitted in GSF or GSM (Gross Square Feet or Gross Square Meters) (modify from default option if necessary):

- GSF
- GSM

6. Indicate whether your survey entries will be submitted in CSF or CSM (Custodial Square Feet or Custodial Square Meters) (modify from default option if necessary):

- CSF
- CSM

7. Indicate whether your Grounds' survey entries will be submitted in Acres or Hectares (modify from default option if necessary):

- Acres
- Hectares

8. Permissions:

I give my permission to APPA to identify my institution's name to all FPI survey participants who also agree to share their institution's name in the published report:

Participants willing to share their identity will have their institution's name included in the participant version of the APPA FPI reports. For example, the function of selecting any two institutions and comparing their statistics is made more meaningful when the institution's name is known. Conversely, all institutions that select NO will only be able to view alphanumeric codes for all participants in the published FPI report. You will only know your institution's alphanumeric code.

- Yes
- No

9. Contact Information:

Please provide the contact information for all data scrubbing related inquiries. This individual and their contact information will also be made available to all FPI participants who elect to share their identity with other participants. Sharing this contact list is important if you wish to receive clarification from any of your peer institutions' submitted data for example.

This contact information will NOT be distributed to anyone who selected "NO" in the previous question.

First and Last Name:

Email Address:

Phone Number:

Module 1: About the Facilities Unit Questions

About the Facilities Unit

The purpose of this section is to capture the cohort information for FPI Report summaries and basic campus statistics. APPA has automated most of this section by automatically populating some cohort information directly from the Integrated Postsecondary Education Data System (IPEDS) such as institutional funding (public or private), Carnegie classification, and APPA region.

1.1. Select your student enrollment range for 2019-2020:

0 - 999

1,000 - 1,999

2,000 - 2,999

3,000 - 4,999

5,000 - 11,999

12,000 - 19,999

20,000+

1.2. Enter your 2019 student enrollment as a number:

1.3.

Facilities Staffing Questions

Total in-house facilities FTE:

Total student FTEs *included above*:

1.4. Work Week Hours:

Standard work week hours (modify if necessary):

40

1.5. About the Facilities Unit comments and notes for future reference:

Module 2: What Facilities Make Up Our Institution Questions

What Facilities Make Up Our Institution?

- The purpose of this survey section is to identify a small set of statistics that describe your campus' physical assets. There are two very important entries in this section: GSF/GSM Maintained and CRV (Current Replacement Value). Both of these data points are used in the calculation of many FPI measurements, with CRV being the most critical of the strategic measurements.
- All FPI survey participants are encouraged to use the CRV Calculation Worksheet because it assists in the development of a sound CRV estimate. It also provides an audit trail for data scrubbing, and it provides drill-down information on campus GSF/GSM and construction costs.
- Please note that the CRV estimate should be based on GSF/GSM Maintained. This means that your CRV calculation may not encompass the entire GSF/GSM footprint of the campus or institution. You will need to keep this in mind when viewing your ratios and measures in the FPI Report.
- Please note that if you've excluded auxiliaries, they need to be excluded from all GSF/GSM and CRV numbers.

2.1. Building GSF/GSM Questions

1. Total GSF/GSM maintained by facilities:

2. Total campus building GSF/GSM OWNED and RENTED, and used by the institution:

3. How much of the total campus building GSF/GSM above is RENTED or LEASED?:

2.2. Number of OWNED buildings:

2.3. Building adjusted average age (weighted average in years) of OWNED buildings:

[Link to video](#) explaining how to calculate weighted average.

[Adjusted average age \(weighted average\) worksheet template](#)

2.4. Grounds/Landscaping Questions

1. Total Acres/Hectares maintained by facilities department:

2. Total number of Acres/Hectares used by the institution (although not necessarily maintained by facilities):

2.5. Net Assignable Square Feet (NASF) Questions:

1. Classrooms NASF/FICM 100 Series:

2. Laboratory Facilities NASF/FICM 200 Series:

3. Office Facilities NASF/FICM 300 Series:

4. Study Facilities NASF/FICM 400 Series:

5. Special Use Facilities NASF/FICM 500 Series:

6. General Use Facilities NASF/FICM 600 Series:

7. Support Facilities NASF/FICM 700 Series:

8. Healthcare Facilities NASF/FICM 800 Series:

9. Residential Facilities NASF/FICM 900 Series:

10. Unclassified Facilities NASF/FICM 000 Series:

11. Non-Assignable Square Feet/FICM WWW, XXX, YYY Series:

12. Structural Square Feet/FICM ZZZ Series:

Total

2.6 What Facilities Make Up Our Institution comments and notes for future reference:

Current Replacement Value (CRV) Calculation Worksheet

The CRV Calculation Worksheet provides the structure for calculating current replacement value by main space categories. When the entries in this worksheet are saved, your calculated CRV will be automatically populated into survey Module 3: *Is my institution adequately funding the facilities management annual budget?* You may change entries in this worksheet and resubmit your new CRV calculation if you find you have made errors in some of the data fields below.

Infrastructure must be entered as EITHER a dollar amount OR a percent of total CRV. Do NOT enter data in both fields. If you choose to enter infrastructure as a percent of CRV, you must enter the desired percent as a decimal (e.g. .30 NOT 30%). APPA recommends using .25 in the absence of a dollar amount or known percentage.

CRV (Current Replacement Value) is the total amount of expenditure (in current dollars) required to replace the institution's facilities to its PRESENT condition. This includes the full replacement cost for all buildings, grounds, utility systems, and generating plants. Insurance replacement values or book values should not be used to determine current replacement value.

IMPORTANT:

- Confirm that the total GSF/GSM (Gross Square Feet/Gross Square Meters) entered into this worksheet is consistent with the total campus GSF/GSM Maintained in Module 2 What Facilities Make Up Our Institution?
- If your only source of square footage by type of building is NASF (Net Assignable Square Footage), apply a factor to convert the NASF to GSF/GSM for your entries in the worksheet.
- Please note that the CRV estimate should be based on GSF/GSM Maintained. This means that your CRV calculation may not encompass the entire GSF/GSM footprint of the campus or institution. You will need to keep this in mind when viewing your ratios and measures in the FPI Report.
- CRV should meet the current acceptable standards of construction and comply with regulatory requirements. It is recommended that the average total project cost per square foot/meter, multiplied by the gross square footage/meters of buildings, be used for the building portion of CRV.

INFRASTRUCTURE: Infrastructure primarily refers to the spaces between the buildings of a campus and to the non-architectural elements of campus design. These elements include, but are not necessarily limited to:

- Circulation systems (roadways, walkways);
- Utilities systems (sewers, drains, steam tunnels, electrical cabling, fiber optic lines);
- Parking systems;
- Campus places (natural places, recreational areas, plazas, malls);
- Paving and hard surfaces;
- Landscape (plants, trees, flowers, ground cover);
- Campus furniture (benches, drinking fountains, bus shelters, partitions);
- Way-finding and signage (entrance/exit signs, campus maps, trailblazer and directional signs, building identification), lighting;
- Refuse and waste removal (trash receptacles, smoking urns, dumpsters);
- Art and artifacts (sculpture, fountains, memorials, plaques), and
- Access points for people with disabilities

Note: Those who are excluding auxiliary services should apportion grounds, utilities and cogeneration CRV to the extent that they support general educational facilities.

CRV CALCULATION WORKSHEET

Please enter the Gross Square Footage/Meters (GSF/GSM) and Current Construction Costs per GSF/GSM for each type of space listed below. For Infrastructure, enter either a fixed amount or a percent to be applied against the sum of Current Construction Costs.

Research/Laboratory

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Classroom/Administration

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Residential

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Parking Garages

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Libraries/Museums/Archives

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Hospitals/Clinics

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Special/General Use (Retail merchandising operations, food facilities, student unions, athletic facilities, etc.)

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Historic Buildings

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Other

GSF/GSM:

Current Construction Costs per GSF/GSM:

Computed CRV:

Infrastructure

Dollar Amount (If dollar amount entered here, do not enter percent below):

Infrastructure as a percent of total building CRV. Enter as a decimal. (e.g. .30 not 30% or 30). APPA recommends using 25 percent (.25) in the absence of a dollar amount or known percentage:

TOTAL CRV:

Please note that the current replacement value should be based on your reported GSF/GSM maintained. This means that your CRV calculation may not encompass the entire GSF/GSM footprint of the campus or institution. This is important because your CRV number is used as a denominator for many ratios in the report and if you report out on your entire footprint instead of what you maintain, your ratios will be skewed. Please review the information below and modify your inputs in this worksheet and in Module 2 if necessary.

Your reported total GSF/GSM maintained from Module 2 (this should match the value below):

Your reported total GSF/GSM by space type from worksheet (this should match the value above):

CRV Calculation Worksheet comments and notes for future reference:

Module 3: Financial Questions

Is my institution adequately funding the facilities management annual budget?

The objective of this survey section is to evaluate the annual funding adequacy for facilities management. Three measurements of facilities funding are reported based on comparisons to

- Adjusted Gross Institutional Expenditures
- GSF/GSM Maintained
- Current Replacement Value (CRV) of maintained campus buildings and their infrastructure.

3.1. Funding Questions

1. Annual facility operating expenditures:

2. Adjusted gross institutional expenditures:

3.2. Current Replacement Value (CRV)

This is a direct entry field. We encourage you to complete the CRV Calculation Worksheet in the previous section. If you do not enter a value in this field, you must complete the worksheet. Your CRV total will auto-populate in this field from the worksheet once you complete it.

Current Replacement Value:

3.3. Financial Questions comments and notes for future reference:

Module 4.1: Facilities Administration Operational Costs and Staffing Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Facilities Administration/Management Operating Costs and Staffing Module:

- Include all costs to operate and maintain facilities administration (management, financial, and clerical support) for all areas within the purview of the facilities department.
- These costs include salaries, wages, employee benefits, travel, equipment, supplies, materials, pro-rated share of telephones, postage, computer rental, accounting costs, and career training programs and other operating costs attributed to the chief administrator, assistant administrators of business management, and office personnel.
- Facilities administration of all areas of the campus includes those FTEs assigned to payroll, billing, materials ordering, personnel records, and planning for the facilities management organization.
- CAUTION: If you exclude auxiliary services in this survey, a pro-rata portion of facilities administration/management function costs are to be excluded to the extent facilities administration/management provides support to auxiliary services.
- Include all in-house and contractor FTEs.

4.1.1.

Facilities Administration GSF/GSM Questions

1. Total in-house and contractor GSF/GSM serviced by Facilities Administration:

2. How much of the total GSF/GSM serviced above by Facilities Administration is outsourced?:

4.1.2.

Facilities Administration Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

Total

4.1.3. Total expenditures entered as a lump sum total:

4.1.4. Facilities Administration benefit as a percent of salary (Enter as a whole number):

4.1.5.

Facilities Administration Full-Time Equivalent (FTE) Questions

1. Total Facilities Administration in-house staffing FTEs:

2. Total student FTE employees *included above*:

3. Total Facilities Administration contractor FTEs:

Total

4.1.6. Facilities Administration comments and notes for future reference:

Module 4.2: Construction/Renovation/A&E Operational Costs and Staffing Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Construction/Renovation/Architectural & Engineering Operating Costs and Staffing Module:

- Include all costs to operate and maintain the duties of construction/renovation/architecture and engineering within the purview of the facilities department.
- These costs include all salaries, wages, employee benefits, travel, equipment, actual estimating, contracting, inspecting, final approval of new or renovated construction and other related projects as well as other costs required to provide technical and engineering services necessary to complete functions assigned and funded by the facilities organization.
- Construction/renovation/A&E for all areas on campus include planning, designing, engineering, contracting, managing, inspecting, financing, and administering clerical support for all capital project areas.
- Exclude the costs of capital construction projects.
- Only operating costs are reported.
- Include all in-house and contractor FTEs.

4.2.1. Construction/Renovation/A&E GSF/GSM Questions There are two GSF/GSM entries for Construction/Renovation/A&E below. You will need to decide which of the two options to report out on below. **Do NOT report out on both options.**

Option 1: Total in-house and contractor GSF/GSM serviced by Construction/Renovation/A&E:

Option 2: Total GSF/GSM of capital construction that is FUNDED and AUTHORIZED for which department performs specific functions in this category:

For option 1 OR 2: How much of the total GSF/GSM serviced above by Construction/Renovation/A&E is outsourced?:

4.2.2.

Construction/Renovation/A&E Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

Total

4.2.3. Total expenditures entered as a lump sum total:

4.2.4. Construction/Renovation/A&E benefit as a percent of salary (Enter as a whole number):

4.2.5.

Construction/Renovation/A&E Full-Time Equivalent (FTE) Questions

1. Total Construction/Renovation/A&E in-house staffing FTEs:

2. Total student FTE employees *included above*:

3. Total Construction/Renovation/A&E contractor FTEs:

Total

4.2.6. Construction/Renovation/A&E comments and notes for future reference:

Module 4.3.: Custodial Operational Costs and Staffing Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Custodial Operating Costs and Staffing Module:

- Include all costs to operate and maintain custodial and housekeeping services for building interior and exterior functions within the purview of the facilities department.
- These costs include salaries, wages, employee benefits, travel, equipment, and other operating costs (i.e., paper, paper towels and tissue, wax, erasers, chalk, cleaners, and other materials and supplies) associated with custodians and supervisors required to clean buildings as well as work by outside contractors to perform custodial tasks. Also include small set-ups in which materials are stored in buildings where they are used.
- Custodial/housekeeping services for all areas on campus include mopping, sweeping, and waxing floors (sanding and refinishing floors are excluded); dusting, polishing furniture and fixtures, such as Venetian blinds, partitions, pictures, maps, and radiators; cleaning chalkboards, whiteboards, trays, erasers, and replacing chalk; washing and dusting walls; cleaning and disinfecting commodes and urinals; cleaning and washing other fixtures, walls, and partitions, and replenishing restroom supplies; emptying and cleaning waste receptacles; dusting and cleaning windows (interior and exterior) and other glass surfaces; sweeping and cleaning entrances; and opening and/or closing building doors and windows.
- Refer to [APPA's Custodial Staffing Guidelines](#) publication for additional information.
- Include all in-house and contractor FTEs.

4.3.1.

Custodial GSF/GSM and Custodial CSF/CSM Questions

1. Total in-house and contractor GSF/GSM serviced by Custodial:

2. How much of the total **GSF/GSM** serviced above by Custodial is outsourced?:

3. Total in-house and contractor **CSF/CSM** serviced by Custodial:

4. How much of the total **CSF/CSM** serviced above by Custodial is outsourced?:

4.3.2.

Custodial Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total in-house labor expenditures (including benefits):

2. Total in-house non-labor and support expenditures:

2a. Consumable supplies expenditures included above:

2b. Capital equipment expenditures included above:

3. Total outsourced contractor services expenditures:

3a. Contractor consumable supplies expenditures included above:

3b. Contractor equipment expenditures included above:

Total

4.3.3. **Total expenditures entered as a lump sum total:**

4.3.4. **Custodial benefit as a percent of salary (Enter as a whole number):**

4.3.5. Please indicate your institution's **current** overall campus Custodial service level based on [*APPA's Operational Guidelines for Educational Facilities: Custodial*](#)

Level 1: Orderly Spotlessness

Level 2: Ordinary Tidiness

Level 3: Casual Inattention

Level 4: Moderate Dinginess

Level 5: Unkempt Neglect

4.3.6.

Custodial Full-Time Equivalent (FTE) Questions

1. Total Custodial in-house staffing FTEs (excluding student FTEs):

2. Total student FTE employees *included above*:

3. Total Custodial contractor FTEs:

Total

4.3.7. Custodial comments and notes for future reference:

Module 4.4.: Grounds/Landscaping Operational Costs and Staffing Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Landscaping/Grounds Operating Costs and Staffing Module:

- Include all costs to operate and maintain campus landscapes and grounds within the purview of the facilities department.
- These costs include salaries, wages, employee benefits, travel, equipment, and other operating costs associated with all supervisory and operating personnel. Also include work by outside contractors to perform landscaping and grounds maintenance.
- Maintenance of all areas of the campus includes growing plants, trees, grass, shrubs, flowers, nursery stock, seed, fertilizers, plant materials, physical education and intramural areas, ROTC drill fields, open ditch drainage, fences, retaining walls, and riprap. Also include care of miscellaneous fixed equipment such as benches and shelter houses. Operation and replacement costs of all equipment used in connection with grounds maintenance should be included as well.
- Refer to [APPA's Grounds Staffing Guidelines](#) publication for additional information.
- Include all in-house and contractor FTEs.

4.4.1.

Grounds/Landscaping Acres/Hectares Questions

1. Total in-house and contractor Acres/Hectares serviced by Grounds/Landscaping excluding building footprints:

2. How much of the total Acres/Hectares serviced above by Grounds/Landscaping is outsourced?:

4.4.2.

Grounds/Landscaping Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

TIP: A large, one-time settlement payment should be excluded because it is not comparable.

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

Total

4.4.3. **Total expenditures entered as a lump sum total:**

4.4.4. **Grounds/Landscaping benefit as a percent of salary (Enter as a whole number):**

4.4.5. Please indicate your institution's **current** overall campus Grounds/Landscaping service level based on *APPA's [Operational Guidelines for Educational Facilities: Grounds](#)*

Level 1: Turf Care State-of-the-Art Maintenance

Level 2: Turf High-Level Maintenance

Level 3: Turf Moderate-Level Maintenance

Level 4: Turf Moderately Low-Level Maintenance

Level 5: Turf Minimum-Level Maintenance

4.4.6.

Grounds/Landscaping Full-Time Equivalent (FTE) Questions

1. Total Grounds/Landscaping in-house staffing FTEs:

2. Total student FTE employees *included above*:

3. Grounds/Landscaping contractor FTEs:

Total

4.4.7. Grounds/Landscaping comments and notes for future reference:



Module 4.5.: Building Maintenance Operational Costs and Staffing Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Building Maintenance Operating Costs and Staffing Module:

- Include all costs to operate and maintain the interiors and exteriors of all buildings within the purview of the facilities department.
- These costs include salaries, wages, employee benefits, travel, equipment, work by outside contractors to perform building maintenance tasks, plumbing, heating, air conditioning, and ventilation, routine repairs, minor corrective maintenance, MMBTUs maintenance, and service calls. Electrical repairs of all types, including primary and secondary systems, certain lamp replacements (requiring special ladders and rigging) and maintenance of outdoor lighting fixtures (excluding energy costs). Also include carpentry, cabinet making, painting, glazing, hardware, locks, keys, closures, and records for same. Include roofing and sheet metal work, including downspouts and gutters, welding, and necessary machine work.
- Maintenance of all areas of the campus includes proper planning, scheduling, dispatching of maintenance work, work management, dispatching of work orders, shop scheduling, and execution of work. Also include developing and revising work orders, cost estimates, maintaining historical maintenance databases, maintaining system configuration, supervising trades people, reconciling estimates with actual costs, maintaining installed computerized maintenance management systems, and maintaining a customer interface.
- Refer to [APPA's Maintenance Staffing Guidelines](#) publication for additional information.
- Include all in-house and contractor FTEs.

4.5.1.

Building Maintenance GSF/GSM Questions

1. Total in-house and contractor GSF/GSM serviced by Building Maintenance:

2.How much of the total GSF/GSM serviced above by Building Maintenance is outsourced?:

4.5.2.

Building Maintenance Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

3a. Total repair materials and spare parts:

Total

4.5.3. **Total expenditures entered as a lump sum total:**

4.5.4. **Building Maintenance benefit as a percent of salary (Enter as a whole number):**

4.5.5. Please indicate your institution's **current** overall campus Building Maintenance service level based on [APPA's *Operational Guidelines for Educational Facilities: Maintenance*](#)

Level 1: Showpiece Facility

Level 2: Comprehensive Stewardship

Level 3: Managed Care

Level 4: Reactive Management

Level 5: Crisis Response

4.5.6.

Building Maintenance Full-Time Equivalent (FTE) Questions

1. Total Building Maintenance in-house staffing FTEs:

2. Total student FTE employees ***included above***:

3. Building Maintenance contractor FTEs:

Total

4.5.7. Building Maintenance comments and notes for future reference:

MMBTU (One Million British Thermal Units) Calculation Worksheet

This worksheet converts commonly used units of energy into British Thermal Units (BTUs) so that comparisons can be made on total energy consumption. The conversion involves multiplying units of energy by factors and while this is simple arithmetic, it can be perplexing. For this reason, we request that you enter the name of the person to contact regarding BTU calculations in the Energy/Utilities Operating Costs and Staffing Module.

The worksheet is organized as follows: The first part of the worksheet asks for your total energy purchased or consumed on campus (***include auxiliaries regardless of your auxiliaries' designation***). The second part contains entries on total energy distributed to or consumed by auxiliary services specifically. The third part contains entries on total energy sold or distributed to external entities.

When the entries in this worksheet are saved, your calculated MMBTU will be automatically populated into the Energy/Utilities Operating Costs and Staffing Module. You may change entries in this worksheet and resubmit your new MMBTU calculation if you find you have made errors in some of the data fields below.

The BTU calculation is based on conversion factors for each type of energy. A default factor is shown but you can override the default factor by entering a substitute BTU conversion number. **DO NOT CHANGE THE ENERGY SOURCE TOTALS.**

TOTAL ENERGY CONSUMED INCLUDING AUXILIARIES:

Legend Of Units:

kLbs = 1,000 pounds of steam

Therm = 100,000 BTUs

kTon-h = 1,000 ton-hrs

MCF = 1,000 cubic feet of gas

	Energy Source Totals	Default Factor	Total MMBTU
Total MMBTU Calculation			
Gallons of Oil #1	<input type="text"/>	138000	<input type="text"/>
Gallons of Oil #2:	<input type="text"/>	139000	<input type="text"/>
Gallons of Oil #3:	<input type="text"/>	140000	<input type="text"/>
Gallons of Oil #4:	<input type="text"/>	150000	<input type="text"/>
Gallons of Oil #5:	<input type="text"/>	145000	<input type="text"/>
Gallons of Oil #6:	<input type="text"/>	150000	<input type="text"/>
Tons of Coal:	<input type="text"/>	24000000	<input type="text"/>
Tons of Wood:	<input type="text"/>	12000000	<input type="text"/>
kWh of Electricity:	<input type="text"/>	3412	<input type="text"/>
kLbs of Steam:	<input type="text"/>	1000000	<input type="text"/>
Therms of Hot Water:	<input type="text"/>	100000	<input type="text"/>
Kton-h of Chilled Water:	<input type="text"/>	12000000	<input type="text"/>
MCF of Natural Gas:	<input type="text"/>	1000000	<input type="text"/>
Other Energy Source:			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total MMBTU (Gross Purchased Energy):	<input type="text"/>	<input type="text"/>	<input type="text"/>

RESALE: SALES TO AUXILIARIES:

Legend Of Units:

kLbs = 1,000 pounds of steam

Therm = 100,000 BTUs

kTon-h = 1,000 ton-hrs

MCF = 1,000 cubic feet of gas

	Energy Source Totals	Default	Total MMBTU Calculation
kWh of Electricity:	<input type="text"/>	3412	<input type="text"/>
kLbs of Steam:	<input type="text"/>	1000000	<input type="text"/>
Therms of Hot Water:	<input type="text"/>	100000	<input type="text"/>
Kton-h of Chilled Water:	<input type="text"/>	12000000	<input type="text"/>
MCF of Natural Gas:	<input type="text"/>	1000000	<input type="text"/>
Other Energy Source:	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total MMBTU Resale to Auxiliaries:	<input type="text"/>	<input type="text"/>	<input type="text"/>

RESALE: SALES TO EXTERNAL ORGANIZATIONS:

Legend Of Units:

kLbs = 1,000 pounds of steam

Therm = 100,000 BTUs

kTon-h = 1,000 ton-hrs

MCF = 1,000 cubic feet of gas

	Energy Source Totals	Default Factor	Total MMBTU Calculation
kWh of Electricity:	<input type="text"/>	3412	<input type="text"/>
kLbs of Steam:	<input type="text"/>	1000000	<input type="text"/>
Therms of Hot Water:	<input type="text"/>	100000	<input type="text"/>
Kton-h of Chilled Water:	<input type="text"/>	12000000	<input type="text"/>
MCF of Natural Gas:	<input type="text"/>	1000000	<input type="text"/>
Other Energy Source:			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total MMBTU Resale to External Orgs:	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total MMBTU Consumption values based on completed criteria in this worksheet:

Total MMBTU which excludes Sales to Auxiliaries and External Organizations:

Total MMBTU Resale to Auxiliaries:

Total MMBTU Resale to External Organizations:

MMBTU Worksheet comments and notes for future reference:

Module 4.6.: Energy/Utilities Operational Costs and Staffing Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Energy/Utilities Operating Costs and Staffing Module:

- Include all consumption and costs to operate and maintain energy services to include all purchased/cogenerated utilities and utilities distribution within the purview of the facilities department.
- These costs include salaries, wages, employee benefits, travel, equipment, and other operating costs such as purchased utilities (i.e. electricity, natural gas, propane gas, and all fossil fuels used for heating, cooling, lighting, and equipment operation. Also include water and sewer).
- If you know your MMBTU consumption, you can enter the amount directly into the appropriate field, but we prefer that you complete the MMBTU Calculation Worksheet. The MMBTU Calculation Worksheet converts commonly used units of energy into British Thermal Units (BTUs) so that comparisons can be made on total energy consumption. The conversion involves multiplying units of energy by factors; while this is simple arithmetic, it can be perplexing. For this reason, we ask you to provide a person to contact regarding Million BTU Calculation Worksheet entries.
- Include all in-house and contractor FTEs.

4.6.1.

Energy/Utilities GSF/GSM Questions

1. Total in-house and contractor GSF/GSM serviced by Energy/Utilities:

2. How much of the total GSF/GSM serviced above by Energy/Utilities is outsourced?:

3. How much of the total GSF/GSM is serviced by cogenerated energy?:

4. How much of the total GSF/GSM is serviced by a district utility system?:

4.6.2.

Energy/Utilities Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

3.a Total annual expenditures for operating a district utility system:

Total

4. Total expenditures entered as a lump sum total:

4.5.8. Energy/Utilities Consumption (MMBTU) and Purchased Utilities Questions

MMBTU is a direct entry field. We encourage you to complete the MMBTU Calculation Worksheet in the previous section. If you do not enter a value in the MMBTU field below, you must complete the worksheet.

Total energy consumption in MMBTUs (million BTUs):

Contact Person for MMBTU Data Scrubbing Questions:

Contact Person's Email Address:

1. Total annual purchased utilities expenditure (including water and sewer):

1a. Total annual purchase for water and sewer expenditures that was included above:

4.5.9. Energy/Utilities benefit entered as a percent of salary (Enter as a whole number):

4.6.7.

Energy/Utilities Full-Time Equivalent (FTE) Questions

1. Total Energy/Utilities in-house staffing FTEs:

2. Total student FTE employees *included above*:

3. Total district utility system FTEs *included above*:

4. Energy/Utilities contractor FTEs:

Total

4.6.8. Energy/Utilities comments and notes for future reference:

Module 4.7.: OTHER Facilities Specific Services Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Other Operations/Facilities Specific Services Operating Costs and Staffing Module:

- Include all costs associated with the operation and maintenance of any other service not previously addressed that falls within the purview of the facilities department exclusively.
- Some examples of additional services may include snow removal, trash removal, recycling, pest management, warehouse functions, special event (set up/tear down), motor pools/fleet transportation, moving, and storage.
- A checklist is provided for typical Other Facilities Specific Services as well as four spaces for any other facilities specific services not covered in the checklist.
- Do not duplicate services. If any of the services noted in the checklist below are covered in any other sections of Module 4, do not list them here.
- Include all in-house and contractor FTEs.

4.7.1.

Please select all the OTHER Facilities Specific Services included in this survey module. It is important to ensure that your reporting throughout this section is consistent with each area that you select below:

- Snow Removal
- Moving
- Trash Removal
- Storage
- Recycling
- IT/Technology
- Pest Management
-

Other

Warehouse Functions

Other

Special Event Set Up

Other

Motor Pool

Other

4.7.2.

OTHER Facilities Specific Services GSF/GSM Questions

1. Total in-house and contractor GSF/GSM serviced by OTHER Facilities Specific Services:

2. How much of the total GSF/GSM serviced above by OTHER Facilities Specific Services is outsourced?

4.7.3.

OTHER Facilities Specific Services Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

Total

4.7.4. Total expenditures entered as a lump sum total:

4.7.5. OTHER Facilities Specific Services benefit as a percent of salary (Enter as a whole number):

4.7.6.

OTHER Facilities Specific Services Full-Time Equivalent (FTE) Questions

1. Total OTHER Facilities Specific Services in-house staffing FTEs:

2. Total student FTE employees *included above*:

3. Total OTHER Facilities Specific Services contractor FTEs:

Total

4.7.7. OTHER Facilities Specific Services comments and notes for future reference:

Module 4.8.: OTHER Facilities NON-specific Services Questions

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Other Costs/Non-Facilities Specific Services Operating Costs and Staffing Module:

- Include all costs associated with the operation and maintenance of any other service not previously addressed that sometimes falls within the purview of the facilities department.
- Some examples of additional services may include security/public safety, environmental health/safety, mail services, and telecommunications.
- Space is provided for up to five additional services.
- Please put the names of Other Non-Facilities Specific services, if any, in the spaces provided.
- Include all in-house and contractor FTEs.

4.8.1. Please identify up to five OTHER Facilities Non-Specific Services included in this survey module. It is important to ensure that your reporting throughout this section is consistent with each area that you identify below:

Other

Other

Other

Other

Other

4.8.2.

OTHER Facilities NON-Specific Services GSF/GSM Questions

1. Total in-house and contractor GSF/GSM serviced by OTHER Facilities NON-Specific Services:

2. How much of the total GSF/GSM serviced above by OTHER Facilities NON-Specific Services is outsourced?

4.8.3.

OTHER Facilities NON-Specific Services Expenditure Questions

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Total In-house labor expenditures (including benefits):

2. Total In-house non-labor and support expenditures:

3. Total outsourced contractor services expenditures:

Total

4.8.4. Total expenditures entered as a lump sum total:

4.8.5. OTHER Facilities NON-Specific Services benefit as a percent of salary (Enter as a whole number):

4.8.6.

OTHER Facilities NON-Specific Services Full-Time Equivalent (FTE) Questions

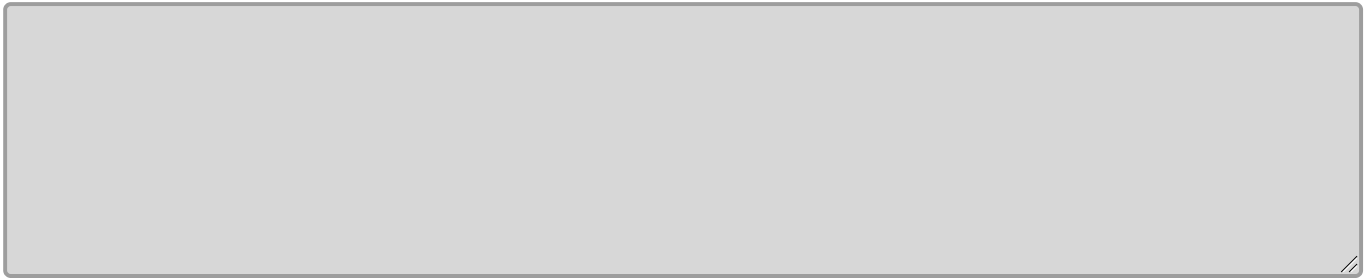
1. Total OTHER Facilities NON-Specific in-house staffing FTEs:

2. Total student FTE employees *included above*:

3. Total OTHER Facilities NON-Specific Services contractor FTEs:

Total

4.8.7. OTHER Facilities NON-Specific Services comments and notes for future reference:



Module 4.9.: Business Practices

Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?

Business Practices Section of Module 4: The business practice measurements cover work orders, energy efficiency, construction management, down-time, and your self-evaluation of financial management and growth and learning practices.

4.9.1.

Work Order Questions

1. Reactive routine maintenance work order AVERAGE cycle time in HOURS with materials on hand:

2. Reactive routine maintenance work order cycle time in HOURS when *ordering and receipt of materials is required*:

3. Reactive routine maintenance work orders are what PERCENT of the total of reactive and preventive work orders? (Enter a whole number without percent sign):

4. Average age (HOURS) of reactive routine and preventive maintenance work orders:

5. Number of staff HOURS in backlog for completing open reactive routine and preventive maintenance work orders:

6. Total FTE assigned to reactive routine and preventive maintenance work orders:

4.9.2.

Energy/Utilities Efficiency Question for 2019/2020

Annual energy efficiency expenditure dollars for the 2019/2020 fiscal year:

4.9.3. Capital Project Management Questions

Project soft actual costs, architecture and engineering costs, and adjusted total actual project costs have to originate from the same capital project(s). At a minimum, select one significant and representative capital project completed in fiscal year 2019-20 regardless of its start date. It is preferable to use a group of capital projects completed in the fiscal year (regardless of their start date) because a group provides more stable information for comparing performance from year-to- year in the future.

1. Total project soft actual costs:

1a. Architecture and engineering actual **dollar** costs included in your total project soft actual costs response:

2. **Adjusted** total actual project costs reported in your total project soft actual cost response:

2a. The dollar value of change orders as a **percent** of adjusted total actual project cost:

4.9.4. **Work Down Time Question**

Total hours of "Work Down-Time" which includes absences from the work place for holidays, vacation, sick leave, work-related injury leave, and other types of paid leave such as jury duty, military leave, personal leave, and maternity leave. Do not include non-productive hours while at the workplace.

Total annual holidays (days) taken per person:

Your reported total facilities FTE from Module 1:

4.9.5. Detailed Work Down Time Questions

- 1. Total annual hours sick leave taken by all facilities FTE:

- 2. Total annual vacation hours used by all facilities FTE:

- 3. Total annual hours missed due to work-related injuries for all facilities FTEs:

- 4. Total annual hours of other leave taken by all facilities FTE:

- Total

4.9.6. Balanced Scorecard Self-Performance Assessment Question

This section contains four performance self-evaluations that cover financial management, internal processes, learning & growth, and customer satisfaction practices. The purpose of this section is to provide facilities professionals with descriptions of performance levels that are based on data driven management practices that produce cycles of continuous improvements.

	Level 1 Copper No Program	Level 2 Bronze Beginning Program	Level 3 Silver Mature Program	Level 4 Gold Stretch Excellent Program	Level 5 Platinum Flawless Program
Financial Performance Self-Evaluation level:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internal Processes Performance Self-Evaluation level:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Level 1 Copper No Program	Level 2 Bronze Beginning Program	Level 3 Silver Mature Program	Level 4 Gold Stretch Excellent Program	Level 5 Platinum Flawless Program
Learning & Growth Performance Self- Evaluation level:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Performance Self- Evaluation level:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4.9.7. Business Practices comments and notes for future reference:

Module 5: Is My Institution Making the Right Investments?

Is my institution making the right investment in our existing buildings, infrastructure, and academic programs?

The purpose of this section is to construct measurements that indicate financial integrity and stewardship associated with the operation and preservation of physical assets throughout the campus. Strategic financial measurements are essential for data driven planning and budgeting of resources for facilities operations and capital projects.

5.1.

Building Useful Life Question

Building's useful life (in years):

5.2.

Investment Need Questions

1. Capital renewal/deferred maintenance need:

2. Renovation, modernization, and adaptation cumulative need:

Total

5.3. Investment Expenditure Questions for Existing Space

If you prefer to enter your expenditures as a lump sum total, please enter the total below this question.

1. Capital renewal/deferred maintenance investment/expenditures:

2. Renovation, modernization, and adaptation investment/expenditures:

3. Capital investment/expenditures replacing existing space:

4. Capital investment/expenditures that expand or create new spaces:

Total

5.4. Total capital investment/expenditures in existing space entered as a lump sum:

5.5. What role does the "Total Cost of Ownership" investment model play in your institution's asset investment strategy?

Level 1

Level 2

Level 3

Level 4

Level 5

5.6. Needs Index Questions

If your institution has a strategy for reducing your Needs Index percentage, what Needs Index percent are you trying to achieve?:

What would be a reasonable number of years for reaching a reduced Needs Index goal?:

5.7. Is My Institution Making the Right Investments comments and notes for future reference:

Module 6: Customer Satisfaction Survey

Are the customers satisfied with the space and service?

- APPA recommends that every institution "check the pulse" of its institution on an ongoing, yearly basis.
- The purpose of this section is to collect statistics and responses that will assist you in assessing the degree to which your organization is directed toward customer satisfaction.

6.1. Select the overall customer satisfaction level that applies to your entire facilities management department:

1- Extremely satisfied	2- Moderately satisfied	3- Slightly satisfied	4- Neither satisfied nor dissatisfied	5- Slightly dissatisfied	6- Moderately dissatisfied	7- Extremely dissatisfied
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6.2. Distribution Index

Indicate the percent of customers whose overall customer satisfaction score averages were in the ranges below. Enter whole numbers without a percent sign. The total must equal 100:

Extremely satisfied:

Very satisfied:

Satisfied:

Dissatisfied:

Very dissatisfied:

Extremely dissatisfied:

Total

6.3. Customer Satisfaction comments and notes for future reference:



Module 7: Employee Customer Satisfaction Survey

Is my facilities department developing staff that can sustain excellence?

- APPA recommends that every institution "check the pulse" of its Facilities Management department on an ongoing, yearly basis.
- The purpose of this section is to collect statistics and responses which will assist you in assessing the degree to which your organization is directed towards creating a high-performance workplace and a learning organization.

7.1. Select the overall employee satisfaction level that applies to your entire facilities management department:

1- Extremely satisfied	2- Moderately satisfied	3- Slightly satisfied	4- Neither satisfied nor dissatisfied	5- Slightly dissatisfied	6- Moderately dissatisfied	7- Extremely dissatisfied
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7.2. Distribution Index

Indicate the percent of employees whose overall employee satisfaction score averages were in the ranges below. Enter whole numbers without a percent sign. The total must equal 100:

Extremely satisfied:

Very satisfied:

Satisfied:

Dissatisfied:

Very dissatisfied:

Extremely dissatisfied:

Total

7.3. Annual mandatory & elective on-shift training hours PER FTE (Do not multiply total hours by all FTEs):

1. Annual hours PER FTE of on-shift required/mandatory training:

2. Annual hours PER FTE of on-shift elective training:

Total

7.4. Percent of facilities open positions filled by internal candidates within the facilities department:

7.5. Employee Customer comments and notes for future reference:

This is the final page of the 2019-20 FPI Survey.

If you are ready to conclude the survey, please be sure to print/download a copy of your survey responses for future reference.

You may re-enter the survey again if you need to update/change any data field. Just re-open the survey link and input your institutional ID to re-enter the survey. Please be sure to download/print a NEW copy of your survey responses.

Thank you for your participation and support of FPI! We look forward to continually improving both the survey and report.



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