Are You Sitting on the Fence?

by Maggie Kinnaman

We recently completed the APPA Facilities Performance Indicators (FPI) survey cycle for fiscal year 2005-06. Only about 200 educational institutions participated in the Facilities Core Data Survey, of the nearly 1,300 eligible respondents. While this is a reasonable level of participation, we urge more of you to participate this year. Full data reporting is vital for us to advance our effectiveness on campus.

The FPI report includes the comprehensive findings of the annual Facilities Core Data Survey, which collects costs, staffing, and building and space data from colleges, universities, K-12 schools and districts, and other educational facilities. This is essential data that allows us to provide a complete overview of how facilities and infrastructure are strategic enablers to the business of education.

APPA's data collection effort is important because it helps members increase their *competence* and *credibility* and puts them in touch with *collaborative* relationships. These three Cs constitute the desired outcomes of APPA's vision, "Becoming a Global Partner in Learning." Our role as educational facilities professionals is most effectively performed when we are able to educate, create partnerships, and influence capital asset decisions within our respective environments.

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APPA's Data Collection History

APPA's Web-based FPI reports have been designed to provide you with a wealth of information readily available at your fingertips. The survey has been refined over many years and today is the synthesis of two surveys: the Strategic Assessment Model (SAM) and the Comparative Costs and Staffing (CCAS) Survey. The Balanced Scorecard format is the framework of our new Web reports and Dashboard and the performance indicators derived from your data input are a synthesis of data collected in both the SAM and CCAS surveys.

SAM continues to be an essential tool that can be used to achieve organizational excellence through continuous improvement. The facilities professional can utilize the model for self-improvement, peer comparison, or benchmarking by assessing an organization's financial performance, effectiveness of its primary processes, readiness of its employees to embrace the challenges of the future, and ability to delight its customers.

The model can also help an institution determine its current level of organizational effectiveness, recognize what is required to move to the next level, and develop strategies and action plans for improving in each of the four perspectives of the Balanced Scorecard. The four perspectives are:
• Financial
• Internal Process
• Customer
• Innovation and Learning

SAM provides facilities managers with a tool that helps to get the attention of and bridge the communication gap that often exists between the facility manager and our campus decision makers. The model helps to tell the facilities story in the language of business by collecting data in such a way that an institution can see at a glance how their facilities performance fares with the performance of others within the profession. Data allows us to speak in the language of our campus decision makers.

The current FPI survey, Web reports, and Dashboard indicators have made the description of SAM above a reality for us all. The structure has been created, and now we need more participation in the annual survey by our colleges, universities, and schools and school districts. Consider participating in the survey; access to the data set without participation does not give you a key to the participant names, which allows you to benchmark against specific peer institutions. Likewise a non-participant does not have access to dashboards for self-improvement.

The significance of the data is enhanced when you do a granular search by Carnegie classification, region, or building age. However, the most important reason for your participation is if you are buying the data set as a non-participant you are not able to talk to your customers or business officers about where you sit within the range. And if you do know where you sit, then we need you to participate, so your data can help us tell the complete facilities story.

Engaging Your Customer

Effective customer service is all about data collection and the ability to use that data to tell your story. You need to fully understand how you are currently operating and how your performance compares to performance of your peers. Unless you know your baseline performance you are not able to establish improvement goals, cannot communicate with the customer,

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and cannot tell your story to campus decision makers.

What to Measure

The trick to effective data collection is in identifying the data points that are important indicators of success versus t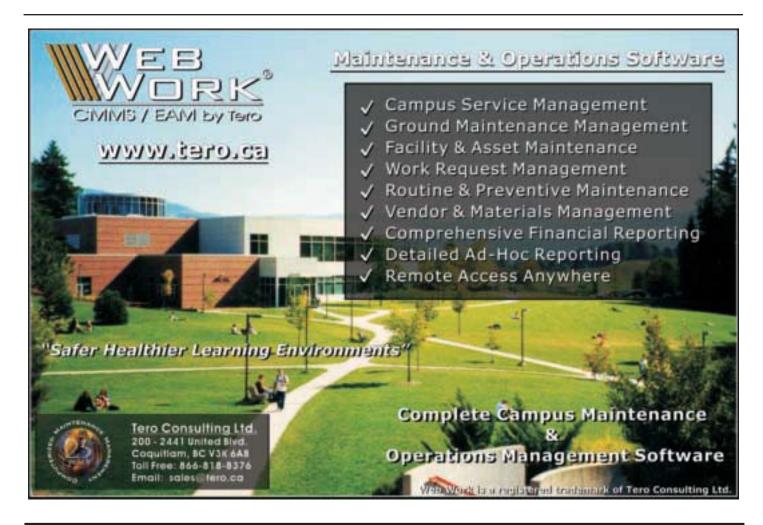he ones that are easiest to capture. A typical facilities management group needs to monitor a number of performance indicators. Many

folks have embraced the Balanced Scorecard model in determining organizational excellence and fully understand that data collection in one area does not adequately tell the story. One must collect financial data, internal process data, employee satisfaction data, and customer data to get a full picture on how you are doing. Of these four categories, only one is specifically related to the customer. However, your focus on the other three perspectives provides the necessary content for sound customer discussions.

For example, do your clients value timely completion of their requested work orders and, if so, what is their definition of timely? What you need is a strategy for data collection that helps facilitate your ongoing discussions with your clients about how you are doing in the areas that they have indicated are important to them.

You must also find ways to measure how you are doing on your stewardship role. This is an area that is core to the mission of any facilities department and is often invisible to the customer. These areas include such work as your preventive maintenance effort, capital renewal and deferred maintenance, overall capital needs, etc. Capturing data related to your stewardship role and sharing this with your key customer groups is just as important as sharing the data related to client requested work orders. Facilities departments must constantly balance their stewardship role and their ability to respond to client requested work orders. This is an important message to share with customers as your ability to respond to their requests is impacted by your workload on the stewardship side of the equation.

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Success Defined

Participation in the annual APPA data collection initiative will result in a better understanding of your operation, an understanding of where your opportunities for improvement lie, a way to better educate your customers, a way to better influence your campus decision-makers, and a forum for continuous improvement and organizational excellence.

Start now by reviewing the Web-based survey document and definitions. Think about your mission and vision, and which of the data points are important to your institution's mission and vision. Identify those performance indicators that are important and determine the source of those numbers. Incorporate the collection of these data points on a cyclical basis, and when August rolls around you will be ready to participate. It is time to get off the fence and commit to the Facilities Core Data Survey. ⛰

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