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

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

FPI LIGHTS THE WAY FOR THE
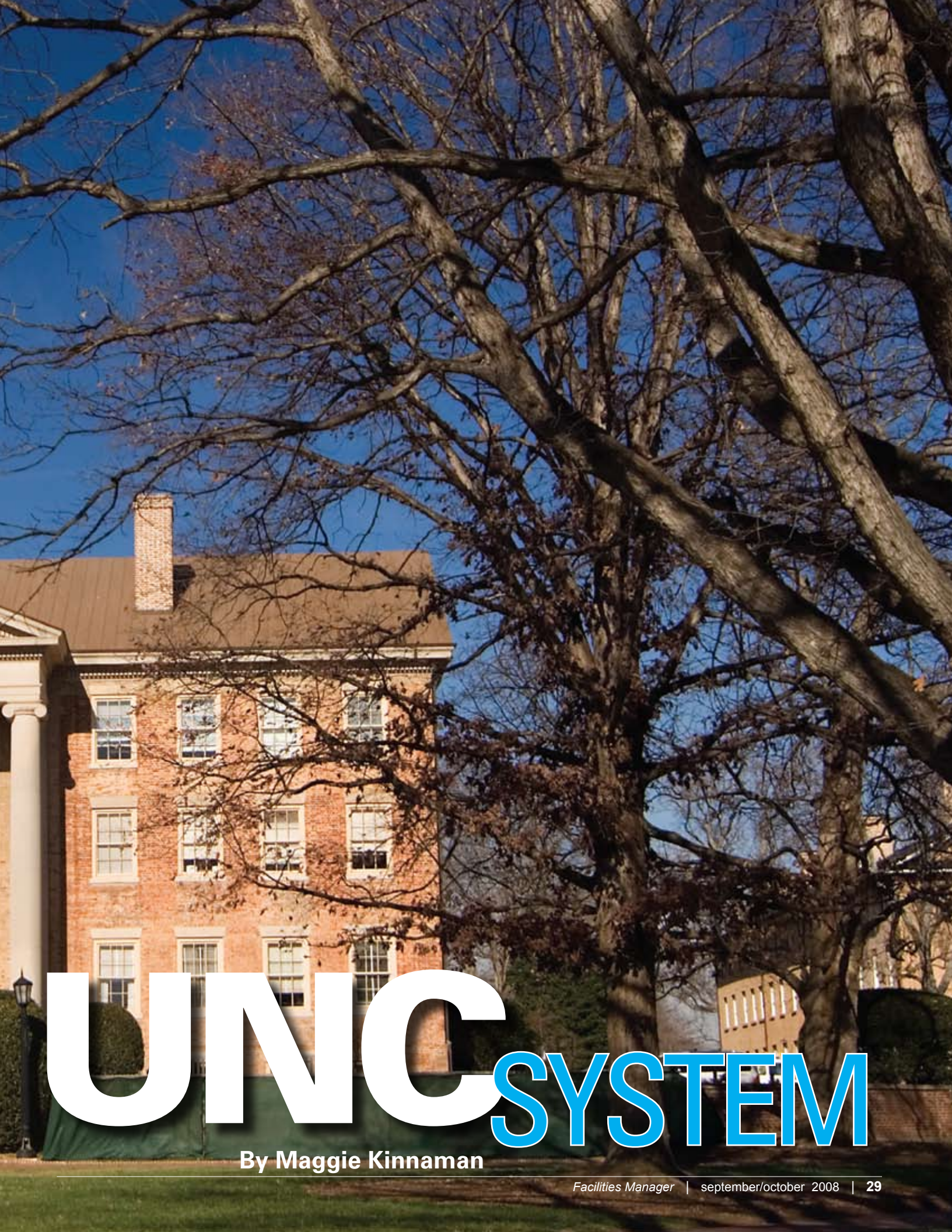
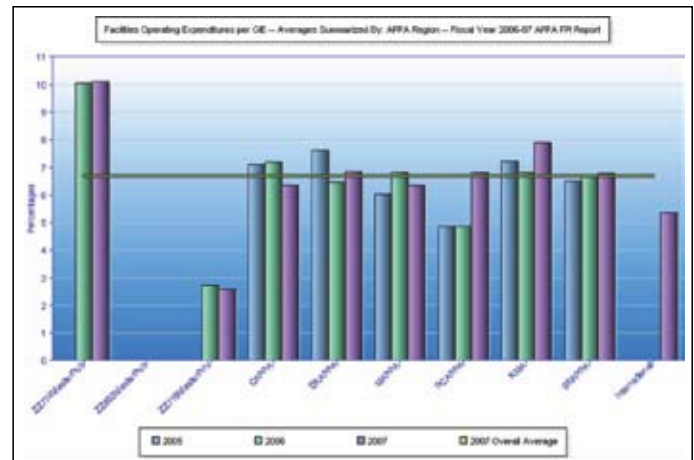# UNC SYSTEM

By Maggie Kinnaman

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

- What facilities you're responsible for.

THIS DASHBOARD DESCRIBES USEFUL LIFE OF FACILITIES

- Whether you're receiving an adequate amount of resources to properly maintain your campus.

- To what degree you're effectively using your operating funds to support desired outcomes.
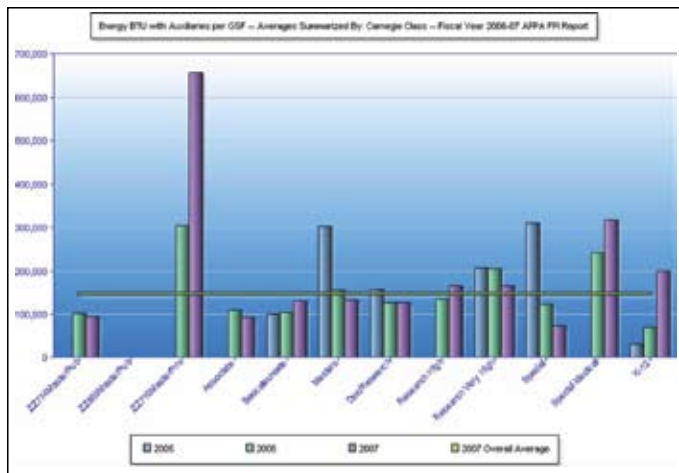
- Whether you're making appropriate investments to your buildings, infrastructure, and programs.
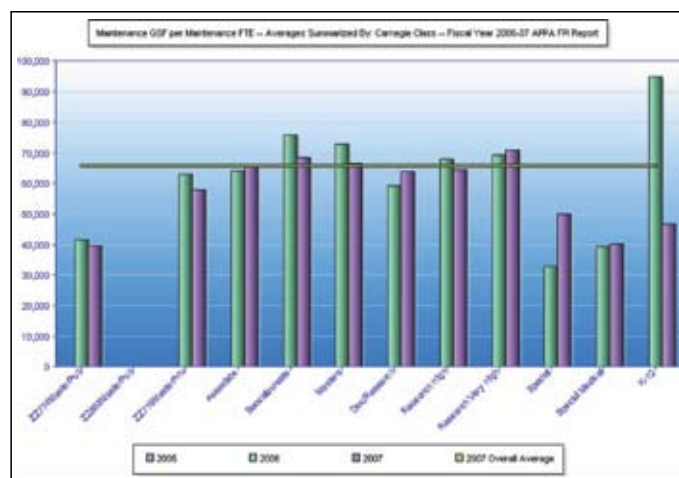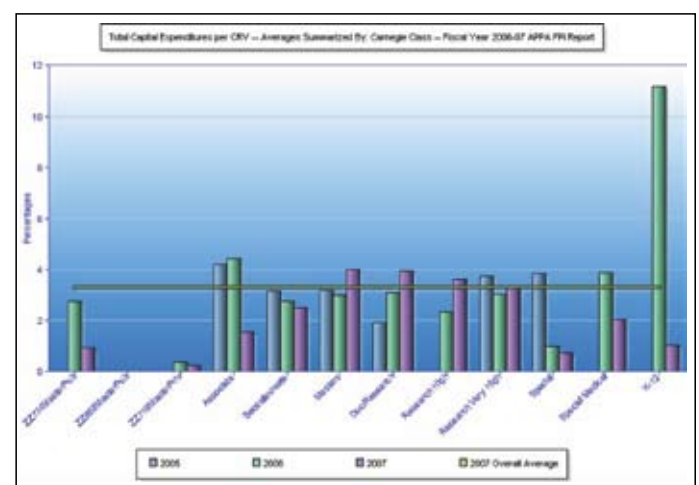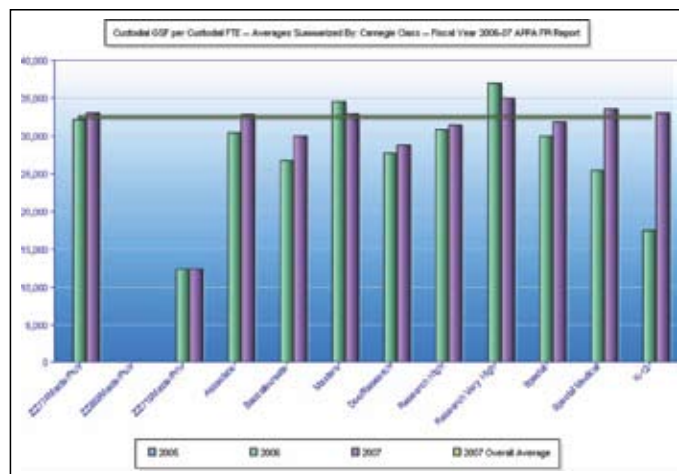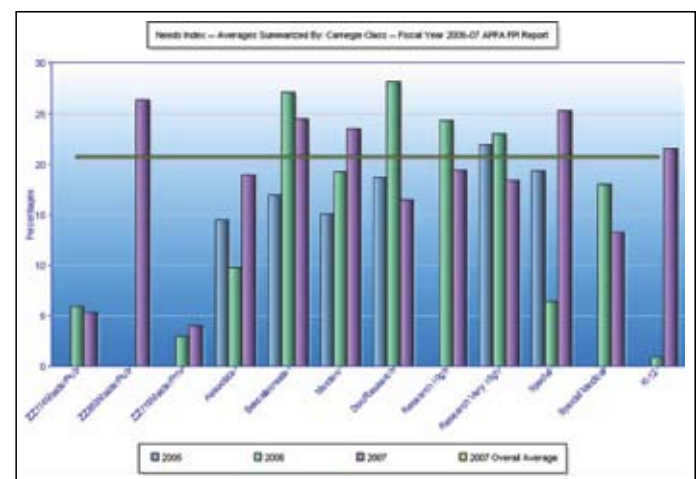
- Whether your customers are satisfied with the space and service.

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

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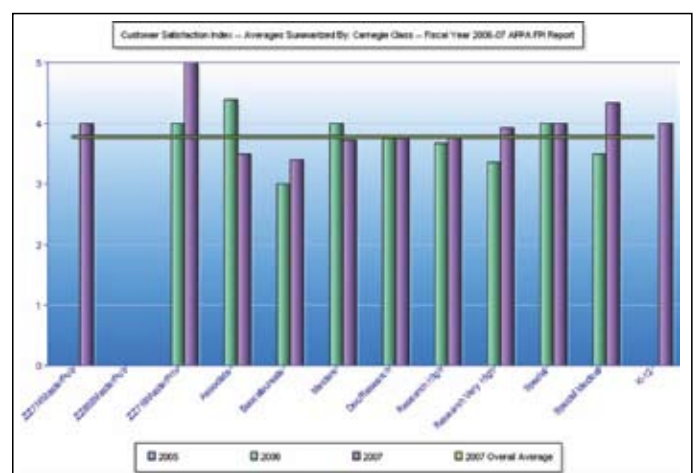s that decides to realign a portion of its CRDM (capital renewal and deferred maintenance) money to address another emergency requirement? It is our responsibility to inform them of the cost of making such a decision.

THE UNC SYSTEM TAKES A BOLD APPROACH

Jack Colby, assistant vice chancellor for facilities at North Carolina State University, saw yet another opportunity for FPI. His vision was to utilize the FPI to address the University of North Carolina System's PACE initiative. The PACE initiative (President's Advisory Committee for Efficiency and Effectiveness) was put in place to encourage universities within the UNC System to look for opportunities to benchmark their facilities organizations and continually improve their performance. Jack made his presentation to the System Board and got a commitment to support a systemwide initiative for the facilities managers at each of the system's 17 campuses.

Perhaps the most important reason this initiative was so successful is that there was an agreement that each institution would go into this with the goal in mind of *improving their own organization by reallocating resources within their operations.* There would be no realignment of appropriations from one campus to another. This commitment by the System office helped institutions feel comfortable in participating without a fear of loss.

This initiative was supported with APPA training to be delivered within a nine-month period of time in late 2007 and early 2008. An RFP was crafted that incorporated three sessions: the first to address survey completion, the second focused on how to read and use reports (data mining), and the third focused on senior facility officers and their leadership role in developing and implementing a change management strategy within their operations.

THREE SESSIONS AT UNC

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

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

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

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

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

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

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

RESULTS

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

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

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

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

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