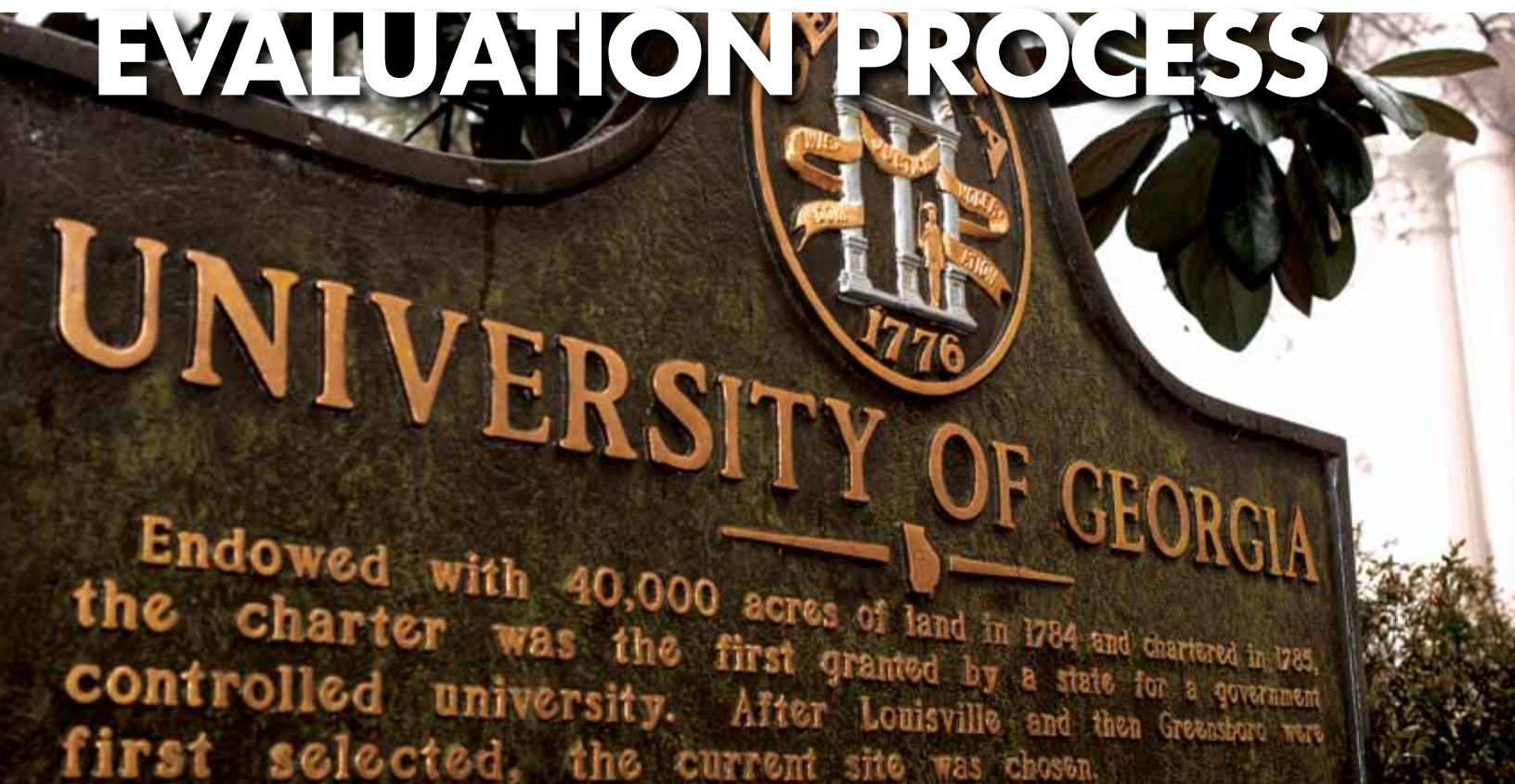


University System of Georgia Uses FPI to Support Its Internal

EVALUATION PROCESS



APPA's Facilities Performance Indicators (FPI) Survey and Report has grown from 190 institutions to a survey reflecting the input of 225 institutions, another 36 institutions preparing to participate in the survey, and 150 institutions that participated in a customized utility consortium survey through a partnership between APPA and the Midwestern Higher Education Compact (MHEC). APPA is well on its way to engage well over 300 participating institutions in the current 2008-09 FPI survey.

A NEW FORMAT

History has shown us that momentum around the survey will build as new resources and tools are embraced by our members. Additionally, the Express/Detailed survey options built into the survey framework allows participants to choose their areas of interest to focus on. Finally, the new structure of the survey and report utilizes an Essential Questions format, which allows the ratios and performance indicators to reveal unique results for each institution. This new format creates a story line for our profes-

sion, following the Total Cost of Ownership model as described in the APPA book, *Buildings...The Gifts That Keep on Taking*, and helps our members properly utilize the data.

APPA also created a series of webinars and an FPI Advisor team to help assist institutions with the completion of the survey and interpretation of the report. This was a major part of our strategy, not only to create a tool but to provide the support that our members needed in order for them to take full advantage of the tool and to convert information to knowledge and wisdom.

COHORTS

A highly successful approach that has been employed is to reach out to those cohorts who have the desire to complete the survey and interpret the results together. This was first done with the 17 institutions within the University of North Carolina System, followed by 23 institutions within the California State University System. This past year, we have worked extensively with 36 institutions of the University System of Georgia. The rest of the article will focus on the results of this initiative.

By Maggie Kinnaman, Ernest R. Hunter Sr., and Greg Adams

USG DEMOGRAPHICS

The University System of Georgia consists of 36 public institutions that cover all Carnegie classifications and represents a diverse community of institutions within APPA. The Carnegie demographics are shown on the next page.

The University System of Georgia (USG) already had an in-house peer evaluation process in place for its 36 institutions, specifically focusing on the facilities management departments. Such a huge initiative needed to be guided by data. Prior to USG's FPI survey initiative, much time was spent by the peer review teams collecting data for each peer review. It was decided that this data would be more efficiently captured using the APPA FPI instrument. Such a complex undertaking required a great deal of coordination and logistics.

Although USG wanted to be trained to participate in the 2008 regular FPI data collection cycle, the timing of the training made that desire impossible to achieve. It was decided that the FPI process would be begin off-cycle from the regular FPI cycle so that the Georgia cohort could be well-trained and pre-

pared to take the survey as well as to interpret the results. The training and off-cycle survey data input would fully prepare them to participate in the 2009 FPI survey cycle, which commenced in the fall of 2009.



THE KICKOFF

Beginning in December 2008, Greg Adams, director of management and operations, as well as Sandra Neuse, assistant vice chancellor for compliance and operations at USG, headed up the USG initiative with a kick-off webinar conducted via teleconference. A number of realities made this engagement somewhat different from UNC. The first being that USG consists of 36 campuses, which is 19 more

than UNC. The second factor was the economic reality present at the time, which presented a real challenge for institutions needing to travel to remote sites to attend the training.

Coordinating the training session required a Herculean effort for all parties involved. Originally, the goal was to conduct the training in mid-November in order for all USG institutions to participate in the 2008 regular FPI cycle. Due to logistical hurdles, the first training session was not conducted until February 19, 2009. This off-cycle survey would now

serve as a test run prior to participating in the official 2009 FPI survey. There would also be enough flexibility built into the schedule to provide adequate time for training, evaluation, and data scrubbing prior to participating in the real deal. This first session focused specifically on how to complete the survey and USG agreed that they would focus on only the essential questions (about 75) and exclude auxiliaries from their responses.

To ensure participation while providing an interactive learning environment at minimal expense to participants, the first training session was hosted at Georgia Institute of Technology (Georgia Tech). Six co-host institutions across the state received representatives from each of the 36 institutions who made their way to one of these sites. The training session was broadcast from Georgia Tech to the co-host sites via Wimba distance conferencing technology. The day-long session consisted of an overview on the importance of data collection, a review of the Essential questions within the survey and some group case studies.

Additionally, the participants identified a number of items that USG would have to resolve for the collective cohort group. The first

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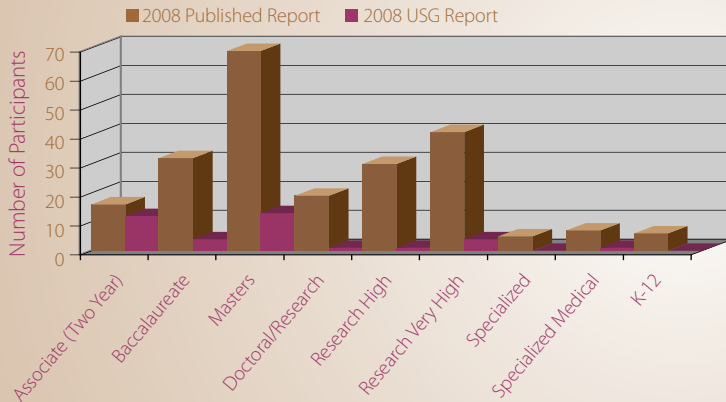
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Distribution of Respondents by Carnegie Class

Fiscal Year 2007-2008 (USG) APPA FPI Report

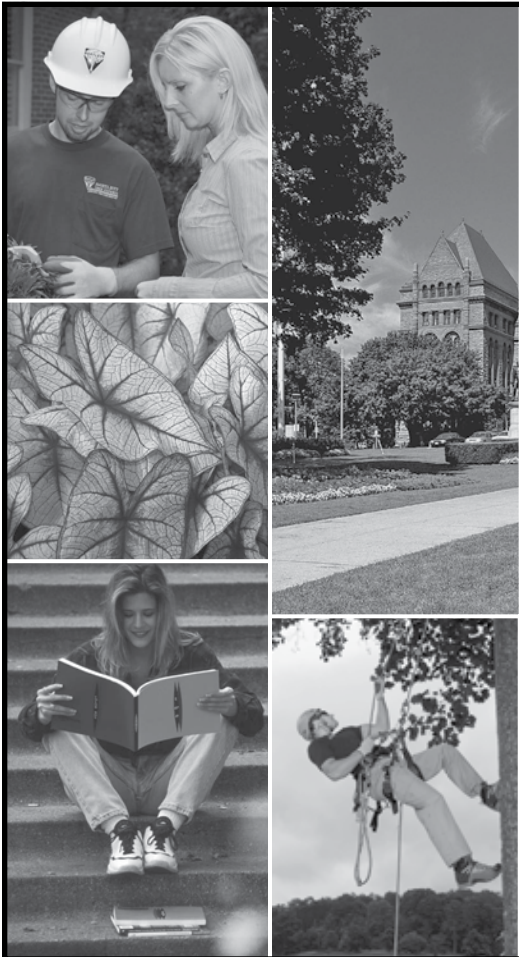


	2008 Published Report	2008 USG Report
Associate (Two Year)	16	12
Baccalaureate	32	4
Masters	69	13
Doctoral/Research	19	1
Research High	30	1
Research Very High	41	4
Specialized	5	0
Specialized Medical	7	1
K-12	6	0

was a process for computing current replacement value (CRV). The key component to this computation is to have an agreed upon current cost of construction for different types of spaces. The research campuses within the cohort agreed to identify those costs of construction per Gross Square Foot (GSF) for various types of space. The next hurdle to overcome was to determine a value for the useful life of buildings and infrastructure. This data point elicited a great deal of conversation and

the System settled on something close to 50 years. A few of the research campuses chose to utilize 30 years.

Armed with enough information to be dangerous, the 36 campuses set out to complete their surveys. Greg set up discussion groups using an online project collaboration software called Basecamp™ so people could stay in touch and ask questions and receive answers from the collective group. In April 2009, the survey closed and data scrubbing commenced.



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The second training session was held on June 24, 2009, with four remote locations using distance education technology. The session focused on the reports and how to use them to tell your story. The agenda included an overview and orientation of the report, a demonstration of how one would use the Executive Report to tell an institutional story and workshop exercises designed to turn the keys over to each of the sites to work in

teams to tell their unique story. For the group work, we set up four cohort groups within the USG system. Each group was assigned to one of the four groups to focus their presentation. The teams were instructed to mine the data and to tell their story using the Executive Presentation feature of the report. Two groups were able to report out their results before we concluded with a “next steps” discussion.

Challenges presented to the group mimic those presented to first time survey participants. Perhaps the biggest question was where to find the source data for some of the data points. Additionally, some of the USG campuses continue to use book value or insurance value as the basis for CRV and that does create an issue. Book value under values the current replacement value numbers and does not present a true CRV value. Current replacement value is defined as the cost in current dollars to replace the campus to its optimal condition. Optimal condition is the operative word. Insurance value is the cost to return the asset to the condition in which the loss occurred, and this would include depreciation. So we really are not looking at an apple-to-apple comparison.

IT'S A JOURNEY

In completing this engagement, it is the hope of APPA that the USG cohort participants will gain the confidence to understand the model, identify areas in their approach for data collection that need strengthening, and most importantly, that they see this as the first step to a continuous improvement journey by participating each year in the FPI survey. In this way, they will be able to chart their progress and educate key decision makers within their respective institutions.

Some key points to take away from this experience is that even in time of reduced budgets, USG found a cost-effective way to bring the necessary training to its 36 schools through creative use of distance learning and teleconferencing facilities. It is easy to shy away from taking on a bold new initiative such as the FPI survey during time of tight budgets; however, Greg Adams of USG recognized that it is during tight budget periods when data driven decisions are most valuable to an institution. By getting in a position through the APPA FPI survey to measure performance, track trends, and compare metrics across the 36 USG institutions and the other 225 institutions in the APPA survey, each Georgia cohort will have one more weapon in its arsenal to fight the current day budget battle.



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With the current economic downturn, the USG, like most public university systems, is experiencing tremendous financial pressures even while enrollments are climbing to record levels. USG facilities officers across the system showed tremendous support for participating in this survey. They understand the importance of capturing the key facilities indicator data necessary to justify budgets, to make the case for needed capital renewal projects, to identify best practices and to establish a baseline from which to improve future performance.

The system has not had a workable method for capturing this data before now, especially in a consistent fashion across institutions as well as allowing data to roll up to the system level. That is where the cohort group is especially useful. The USG recognizes that there are other FPI assessments available in the marketplace, but the APPA survey proved to be a very affordable option in tough times. This put participation in the survey within financial reach, and the benefits to USG institutions are expected to far exceed the resources required to participate in the survey.

These factors are reason enough to justify USG participation in the survey. However, the icing on the cake is the efficiency gained by being able to use the data as the basis for moving ahead with the USG Facilities Peer Evaluation Initiative, a strategic initiative set in motion by the Board of Regents of the

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USG at the recommendation of Regent Willis Potts. The use of the survey results as evaluation criteria helps combat the potential perception of bias among peer evaluators and provides a well established set of tried and true criteria developed by APPA in conjunction with its member institutions. 

Maggie Kinnaman is a Past APPA President and longtime contributor to APPA's Facilities Performance Indicators survey and report; she can be reached at maggiekinnaman@comcast.net. Ernest Hunter is a retired APPA member and president of Hunter Consulting & Training; he can be reached at ernesthunter@gmail.com. Greg Adams is director of management and operations for the University System of Georgia; he can be reached at greg.adams@usg.edu. This is Hunter and Adams' first article for *Facilities Manager*.

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