

A close-up photograph of several hands holding white puzzle pieces against a dark, blurred background. The puzzle pieces are interlocking, and the hands are positioned as if they are about to assemble or have just assembled a section of the puzzle. The lighting is soft, highlighting the texture of the skin and the edges of the puzzle pieces.

# Does **PDC** Belong in **Facilities Manage**



By Alan Dessoiff

Whether planning, design, and construction of buildings should be part of facilities management, with its traditional operations and maintenance functions, or separated from it, has been a divisive question on many campuses for a long time. Now, although it isn't happening everywhere, facilities managers at a number of institutions, public and private, large and small, see a growing impetus to combine the two under the oversight of a single senior administrative officer. The consensus is that that is how facilities management works best.

While separation of the functions sometimes works well, it also can cause frictions between the different departments and personnel responsible for undertaking them, leading to expensive inefficiencies and bruised relationships. Accordingly, facilities managers are hailing initiatives to bring them together under a single leader, usually but not always at the vice presidential level, with responsibility to make sure they collaborate in the best interests of their institution.

Still, the issue is "fraught with controversy," says **Harvey H. Kaiser**, a longtime APPA member, formerly an administrator at Syracuse University and now president of his own consulting firm that works with schools worldwide on facilities management and other issues. Kaiser also co-authored the APPA book, *Strategic Capital Development: The New Model for Campus Investment*.

To some people, he says, "It's a no-brainer. They belong in the same organizational structure, at equal levels, reporting to the same person. But others are defensive about design and construction. They feel it should report separately to someone else and even be in separate buildings, if possible."

Then again, if the functions are separate, Kaiser says, there is a risk that "you'll find the designers going off without any understanding of the campus infrastructure and ignorant of many of the operational aspects—whether what they are doing is feasible, appropriate, or disruptive of the campus."

"I'm sure you can be effectively organized either way, but my opinion is that the best model is a combined operation of capital projects and facilities management," asserts **Mary S. Vosevich**, director of physical plant at the University of New Mexico and APPA's President as of mid-July. "That way, you are working toward the same goals and can find the right balance between the different issues that plague educational facilities, like deferred maintenance and building renewal." At UNM, Vosevich's physical plant department, the office of capital projects, and the department of planning and campus development are parts of the division of institutional support services, headed by an associate vice president.

"It works best if you have somebody looking at the entire forest, not just some of the trees. I'm a big believer in the chief facilities officer," declares APPA Fellow **William A. Daigneau**, who holds that position at the University of Texas MD Anderson Cancer Center where, he says, "everyone who has some hand in the creation or management of space on our campus sits around my table. I have cradle-to-grave responsibility."

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tenance, planning, design, and construction staff under one leader,” agrees **Joyce Topshe**, associate vice president for facilities at Wesleyan (Conn.) University, who has worked in both types of organizations at three institutions. She says three staff reorganizations since she joined Wesleyan have resulted in a combined team with benefits that now include better communication between maintenance and construction management staffs and efficiencies in administrative support, budget management, software systems, staffing, equipment, office facilities, vehicles and training programs, as well as “cohesive strategic planning, priority setting, and management of the team.”

**James O. Roberts**, vice president for business, treasurer, and corporate secretary at Campbell University, says the design and construction component has been part of facilities management at all four institutions where he has worked. “My experience has always been that the overall institution wins. You have the people at the table who can cover the issues to allow the design and construction process to seamlessly integrate into the university’s systems and work to meet the needs of the building’s occupants,” he explains.

“I like to believe that the inclusion of the planning, design, and construction group in the same department as plant operations is a very good thing,” states **Steven C. Thweatt**, associate vice president for planning, design, and construction at Emory University, where he and an associate vice president of facilities management serve under the Office of the Vice President.

How good it can be is being demonstrated now at Emory, where construction is underway on a new freshman residence hall and a research building. In a key move, front-line facilities management personnel who will have to operate and maintain the buildings later regularly walk through the construction sites with construction managers and suggest changes that will be worthwhile for the university in the years ahead.



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“We have retooled the way we involve the trade shops so they can see the construction while it’s ongoing, not at the end,” says

Thweatt. “When you see something for the first time at the end, when it’s all spit-and-polish new, and the keys are given to you, there is a temptation to criticize things you might not like so much. But if you can walk around while it is being built and say, ‘Hey, if you did it this way instead of that way, it would be better,’ we can make those changes right on the spot.”

“We have changed many things that just weren’t noticed in the plans,” he continues, like moving a filter to improve access to it that maintenance personnel might need later. “The construction people don’t pay attention to stuff like that in the beginning because they never have to come back and do maintenance, and your design teams typically are not responsive because they never have maintained anything. So while something looks great on paper, when we put it in place we can see issues developing and know we need to make corrections.

“At that point, it’s relatively inexpensive to do those things. We make the changes that are affordable and make sense functionally, and there is huge appreciation on both sides when that happens,” Thweatt says. “We expect that when these projects are completed, we will have very few people walking around and criticizing things because everybody will feel some sense of ownership in the way they were completed.”

Similarly, in advance of some of its big construction projects, MD Anderson puts some trade personnel in a class to train them in how a project is managed, then involves them in physically inspecting construction while it is underway. “You can’t just send inexperienced people out there to take a look if they don’t know how project management works,” Daigneau explains, “but if they go through



this class, they are like qualified construction inspectors by the time they hit a project.”

Although they might not do it the way Emory and MD Anderson do, facilities managers at other institutions agree that it makes sense for several reasons to combine all the functions of facilities management. “They’re just more effective that way,” says Vosevich of UNM. “As much as we would like to believe we have similar goals even if we are separated, I don’t think that’s the case. When organizations are not combined, there is more work to do. You have to spend more time making your case for things.”

“To me, it comes down to alignment, and whether everybody is after the same thing. Organizational structure can enable the alignment that is necessary,” maintains **Donald J. Guckert**, associate vice president and director of facilities management at the University of Iowa. He oversees more than 600 employees who coordinate campus master planning, manage design and construction, maintain and clean buildings and grounds, and provide utilities and energy management. An APPA Fellow, Guckert also is dean of the PDC track at the APPA Institute for Facilities Management.

Guckert and other administrators cite two key issues that often stand in the way of bringing the major components of facilities management together and improving collaboration between the personnel who manage them.

One is cost of ownership of a new building. “There is good reason for difficulty in a complete and total merger of these two units. Their ultimate goals are different,” says Thweatt. “For the most part, project managers don’t care that much about maintenance, and the maintenance people don’t care that much about what a building looks like. They don’t ignore it, but it’s not their primary concern.”

Adds Vosevich: “The capital projects folks who have a building for maybe a

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couple of years don’t have the ownership mentality of the facilities management side, which will have it for the next 50 to 100 years.” She says that “from the twinkle-in-the-eye” of a new project, her department is involved in its design, but “there still is something lacking in that relationship. It’s more efficient when it falls under one umbrella.”

Guckert suggests that the primary interest of the academic department that might occupy a new building isn’t necessarily saving money in its construction and maintenance. “They want image. They don’t want better mechanical systems in the basement and other things that are less attractive,” he says. “If it’s a question of putting your money into an additional classroom or lab, or increasing the energy efficiency of the building, the dean is going to want the classroom or laboratory, and if you have a project management staff outside the operational staff, they’re going to be motivated to satisfy the dean.”

On the other hand, if the two sides are more closely aligned, “they will take an institutional view and make good, solid institutional decisions,” says Guckert, like putting money into the mechanical systems to save money in operating costs over the life of a building. But he acknowledges that some managers “don’t see the value of putting money into building systems versus having nicer rooms for the students. These are trade-offs, which make it difficult. If you decide to do one thing, you can’t do the other.”

#### A CULTURAL DIVIDE

There also is a cultural issue that can develop, Guckert says, when “you have architects and engineers with degrees and maintenance folks who usually are blue collar. That creates a natural divide, and it takes a lot of effort to merge those cultures.”

Kaiser calls it a “personality” issue. Emphasizing that

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"I'm being polite about it," he says it can develop when senior design and construction managers involved in a project "think of the maintenance people as a bunch of oil-can people without an 8<sup>th</sup> grade education, who can't be in the room if you're talking serious stuff." Designers, in particular, take an "elitist" approach, he says. "They'll get it built, turn it over to the maintenance people, and that's the last they'll ever know or care

about it," says Kaiser. "I've heard people say that the planning and design side of things is a lot more glamorous than what we do on the maintenance side," says Vosevich.

"The 'us and them' or 'those

other people' mode is an easy trap to fall into. It's like *Upstairs, Downstairs*," says Thweatt, referring to the popular former British television series about an upscale English family and their servants.

Divisive attitudes "will continue to fester" unless senior officers responsible for different functions make clear that "some of these games that people play will not be tolerated. Whoever these people report to should be intolerant of any lack of teamwork," says Daigneau.

The cultural divide can be addressed by "forcing people to talk to each other," says Kaiser. "On a regular basis, they should meet face-to-face in a room with their senior reporting persons and exchange what they have to say on progress and problems. It's counter-productive to have these two areas reporting to different senior officers and not talking to each other." Major research universities largely "have sorted this out," Kaiser says, understanding that "the two departments function at an equal level, under a senior officer, and meet regularly to exchange information."

It's happening at smaller, liberal arts institutions as well. At Wesleyan, decision-making "is much more of a team effort" than it was when she arrived, Topshe says. She describes how a group representing both maintenance and construction staffs

meets annually to prioritize an \$8 million budget for major campus maintenance projects. "Everyone in the group has an opportunity to speak on behalf of their priorities," and a scoring system is used to determine the order of priorities, Topshe reports.

The physical proximity of departments to each other also helps. Relationships improved at UNM when the capital projects office moved into the physical plant building, says Vosevich. "Now, our folks can walk back-and-forth across the hall and collaborate on projects. It simplifies the interaction. It's not that there were sour relationships before, just different agendas. When you start working in the same building, you get to know each other better."

"If you are forced to live in the same house, the sibling rivalry is more manageable. It's not perfect, but there is a lot less friction," concludes Thweatt. ☞

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