

FPI 2.0 and the Facilities Journey

By Theodore J. Weidner, Ph.D., P.E., CEFP, AIA

Facilities officers are regularly asked to explain the interface between architecture, engineering, occupants, and costs. While many can speak to two or three of these fields, few are able to do so for all four. Rather than develop an expertise in all areas, facilities officers mostly utilize metrics (some called key performance indicators), combining data to create information—and ideally knowledge—about such a large and complex operation. The APPA Facilities Performance Indicators (FPI) were developed to assist facility officers with those baseline metrics for campus facilities.

In addition to the FPI metrics, APPA has participated actively in the development of several standards that address facilities. The ISO 41000 series and APPA 1000 are two recent examples. ISO 41001, *Facilities Management – Management Systems – Requirements with Guidance for Use*; ISO 41011, *Facilities Management – Vocabulary* (facilities management terms and definitions); ISO 41012, *Facilities Management – Guidance on Strategic Sourcing and the Development of Agreements*; ISO 41013, *Facility Management – Scope, Key Concepts, and Benefits*; and APPA 1000-1 – *Total Cost of Ownership for Facilities Asset Management (TCO) – Part 1: Key Principles*, are all tools that facilities officers can utilize to knowledgeably inform campus stakeholders about the effectiveness of facilities operations and development. While these standards do help facilities officers, they demand data to work effectively.

The FPI can be used to feed several of the tools associated with each of the above standards, making facilities data more important and valuable. It also means that the FPI needs to become an easier tool



for facilities officers to use and to help them tell the story about their facilities. A team of dedicated people are working on that problem and creating what we are calling “FPI 2.0.”

FPI 2.0: GATHERING DATA AND REPORTING METRICS

There are two fundamental steps that need to be taken to make FPI 2.0 a go-to tool for facilities officers. The first is to make data gathering easier. There are number of education data points requested by the FPI that are outside a facilities organization’s normal sources, but which are reported to different governmental and nongovernmental organizations. One of the best practices for data gathering is to ensure the data is entered once by the person responsible for the data.


A frequent example in the FPI is the annual gross institutional expenditure—a big but important number that chief financial officers (CFOs) know, but not

many facilities officers know. This and other significant data is intended to be pulled automatically for the FPI, so that it is accurate, consistent, and reliable. When the CFO sees the same number displayed in the FPI as reported by the institution, the FPI metrics become more meaningful.

The second step needed to get FPI 2.0 up to speed is to improve the reporting of metrics from the FPI. Since its development, the FPI has had a standard set of metrics that were determined to be the “best fit” of information for facilities officers’ needs. However, every organization is unique, and a standard set of metrics tends to ignore the uniqueness of the organization and frustrates a facilities officer attempting to respond to that uniqueness.

In addition, graphics display techniques are generally not in a facilities officer’s toolkit. Utilizing a widely available platform, Tableau, FPI 2.0 will provide the senior facilities officer with graphic tools to tell the story regardless of whether the issue is deferred capital renewal, custodial operating costs, or anything in between.

The facilities officer will be able to leverage the strength of the FPI to track performance over time and show how institutional and organizational goals are being met through consistent and reliable measures. The FPI can still be used for low-level comparisons between “similar” institutions, but more complex analysis of disparate data will be possible too. The facilities officer will enter the world of big data and be able to make meaningful connections. These connections may make it possible to demonstrate organizational effectiveness, identify both achievable and stretch goals, and create additional opportunities to have a “seat at the table.”

FPI 2.0 is not a destination—it is part of the facilities journey. Watch for it and take advantage of it. 

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