

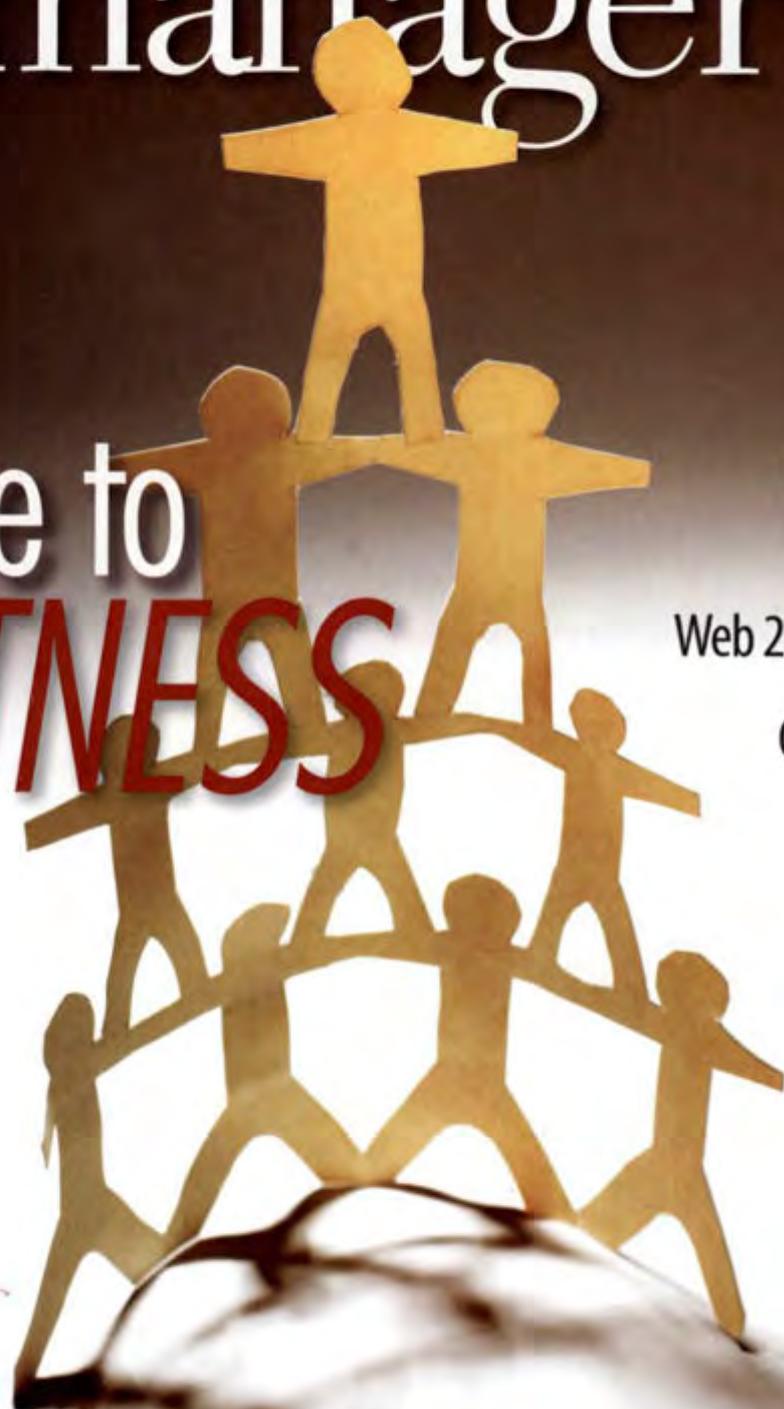
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# FACILITIES

JULY/AUG 2008

# manager

## The Rise to *GREATNESS*



### INSIDE

It's Not Just the  
Leader's Vision

Web 2.0 and Facilities

Cleanliness and  
Learning

APPA Annual  
Report

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## The Rise to *GREATNESS*

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The very best leaders understand that their key task is inspiring a shared vision for the organization. Understanding and communicating your constituent needs can result in greater satisfaction among customers and staff alike.

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*By Jeffrey L. Campbell, Ph.D., and  
Alan S. Bigger, M.A.*

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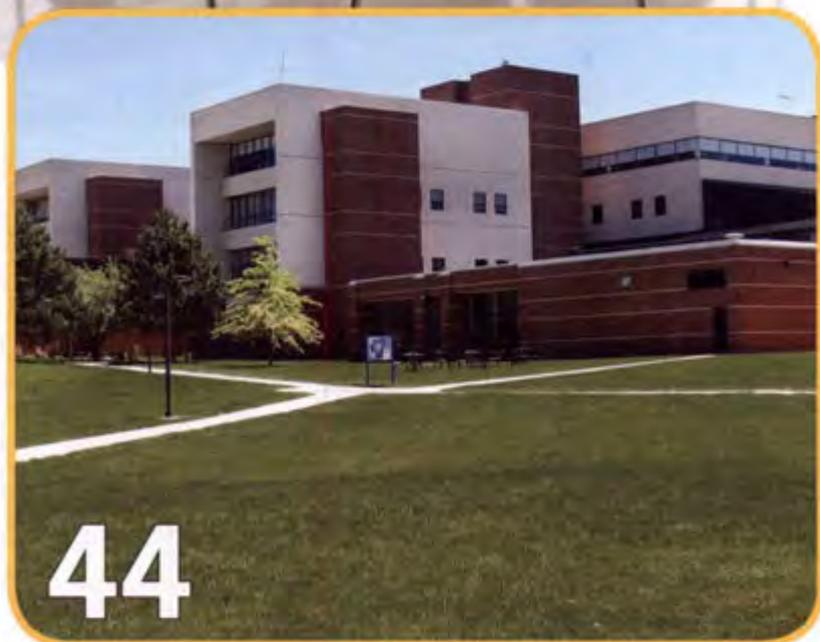
*By Glenn R. Rosenberg*

### AR-1 2007-2008 APPA Annual Report



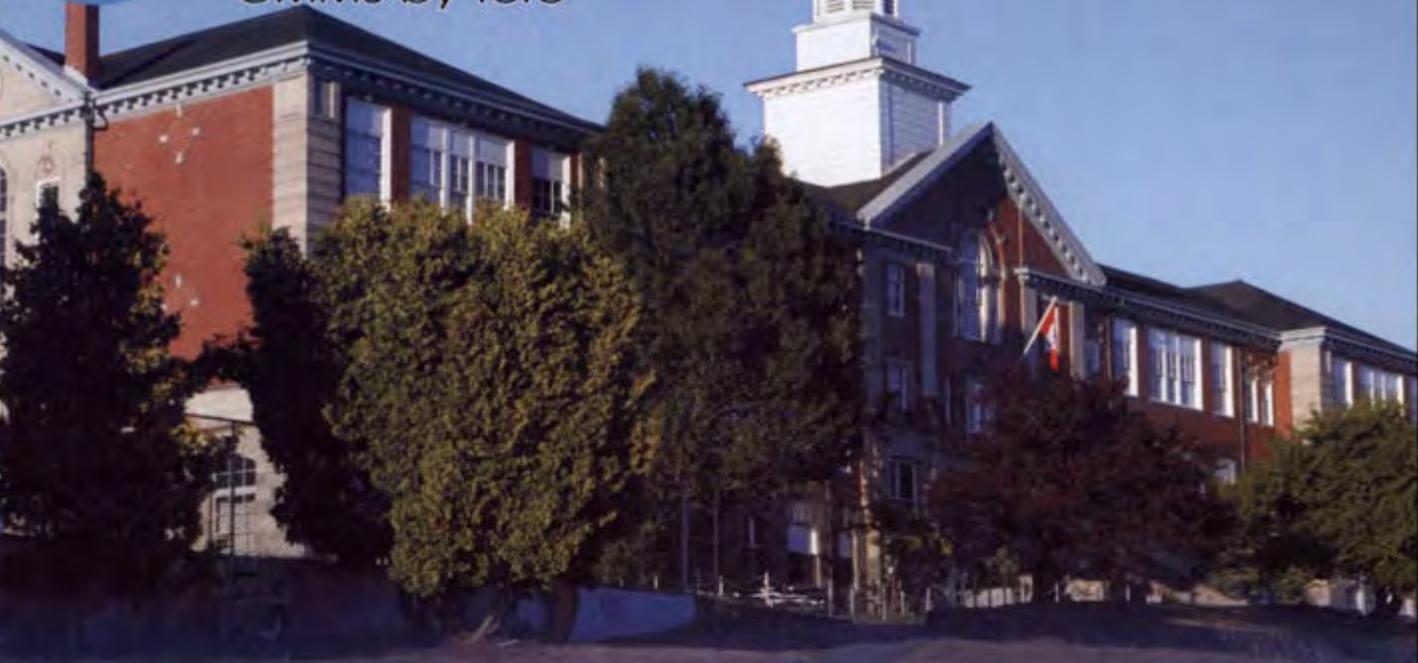


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The Rise to Greatness, the theme for the APPA 2008 conference, can mean many things. But just read through the special annual report section of this issue and get a glimmer of the many ways in which APPA has taken this theme to heart.

Through the many programs, activities, and initiatives of the Board of Directors, the APPA committees and task forces, and the individual members themselves, APPA continues to position itself as the association of choice for educational professionals. We see our role, in this ever-changing environment, as "elevating facilities professionals into influential leaders in education." When reading the reports of the APPA presidents, vice presidents, and executive vice president, you will understand the passion, focus, and forward-thinking of the APPA leadership and organization.

We're pleased to include in this issue articles by two of our speakers at APPA 2008. James Kouzes discusses how the leader's vision must be a shared vision among the staff and constituents, and Scott Allen helps clear up some of the mystery surrounding the advent of Web 2.0.

You'll also read Jeff Campbell and Alan Bigger's report of their research findings in the newest CFaR project, "Cleanliness & Learning in Higher Education." Cosponsored by APPA and ISSA, the project is a tremendous contribution to the body of knowledge for the facilities management profession. The full report is free to APPA members and available through the online bookstore at [www.appa.org/bookstore](http://www.appa.org/bookstore).

The Rise to Greatness also reflects the APPA staff's commitment to service and continuous improvement, and we believe we have the strongest staff in place ever. Allow us to use this space to list the current staff members; we are here to serve you. ☎

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*Leslie Young*  
Web and Database Systems Manager

### Coming in Sep/Oct

- Profile of 2008-09 President William M. Elvey
- Effective & Innovative Practices Award Winners
- APPA 2008 Highlights

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### About APPA

APPA promotes leadership in educational facilities for professionals seeking to build their careers, transform their institutions, and elevate the value and recognition of facilities in education. APPA provides members the opportunity to explore trends, issues, and best practices in educational facilities through research, publications, professional development, and credentialing. Formerly the Association of Physical Plant Administrators, APPA is the association of choice for 3,200 educational facilities professionals at more than 1,500 learning institutions throughout the United States, Canada, and abroad. For more information, visit us at [www.appa.org](http://www.appa.org).

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# facilities digest

## Save the Date for APPA 2009

Building on the excellence of the APPA 2008 conference, we invite you to mark your calendars now for APPA 2009, July 8-10 in Vancouver, British Columbia, Canada. The theme is Focusing on the Critical Few. APPA is dedicated exclusively to serving the needs of educational facilities professionals seeking to build their careers, transform their institutions, and elevate the value and recognition of facilities in education. This conference will be especially tailored to educational facilities professionals striving to bolster their career and enhance, maintain, and protect the quality of their educational facilities.

## EFP Credential: The New Standard for Facilities Professionals

The Educational Facilities Professional (EFP) exam is quickly becoming a standard in the industry. More than three dozen of your colleagues have already earned the EFP designation. You too can earn an accredited credential as a professional proficient in the core areas of educational facilities management. The credential is earned through a comprehensive examination testing knowledge in four core areas key



to the profession: general administration; operations and maintenance; energy and utilities; and planning, design, and construction.

You can take your career to the next level by earning the EFP credential. The next EFP credentialing preparatory courses will occur September 12 in Austin, Texas. You can take the exam September 12 or 13. For additional information, visit <http://certification.appa.org> or contact Derrick Johnson at [derrick@appa.org](mailto:derrick@appa.org).

## Post Job Openings on Job Express

Find the facilities professional with the right tools for that job opening on your campus through Job Express. APPA's premier job-listing service features job descriptions for all levels within the facilities profession. Eight-week posting rates are:

### APPA Members

Up to 500 words: \$510  
501-800 words: \$730

### Nonmembers

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501-800 words: \$870

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multiple ads. Place your ad in more than one issue of Job Express, or place more than one ad in the same issue, and you'll receive 10 percent off the cost.

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- General Administration & Management
- Operations & Maintenance
- Energy & Utilities
- Planning, Design & Construction

Non-members pay \$70 for 6-mo. or \$100 for 12-mo. resume posting. APPA Members may use this service for FREE. Employers can search the Resume Bank too. The six-month rate is \$150 for members and \$220 for nonmembers.

For details on Job Express and the Resume Bank, visit [www.appa.org/jobexpress](http://www.appa.org/jobexpress).



## Professional Development & Certification Opportunities

APPA's professional development and educational programs provide you with the knowledge and support to take the lead in your career and your institution. APPA's programs are created and led by facilities professionals to support your effectiveness, success, and achievement, allowing you to earn the credentials, recognition, and knowledge to elevate your standing and your role within your institution. Register at [www.appa.org/training](http://www.appa.org/training).

### Supervisor's Toolkit

September 7-11 Austin, TX

### Institute for Facilities Management

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September 7-11 Austin, TX

## Have You Considered an FMEP?

The effect of enhanced facilities influences the retention and recruitment of students. Do you know how your facilities program measures up? If you want to:

- achieve continuous quality improvement
- exceed customer expectations
- develop a strategic planning tool
- improve your understanding of facilities issues
- change your organization's responsiveness

Consider APPA's Facilities Management Evaluation Program (FMEP). The program provides institutions with a customized evaluation conducted by a team of institutional peers across a comprehensive set of criteria. Evaluations are in progress. For more information, contact Holly Judd at [holly@appa.org](mailto:holly@appa.org).

## Submit Membership Directory Changes

We are currently updating our database for the 2008-2009 Membership Directory. If you have any staff, position, address, or other changes to make for the directory, please send them to Santianna Stewart at [santianna@appa.org](mailto:santianna@appa.org).



## Participate in the 2007-08 FPI Survey

Plan to participate in the 2007-08 Facilities Performance Indicators (FPI) Survey, which is conducted annually, from late August to late November. The Web-based FPI Report and Dashboards will be published in February 2009. The FPI Survey:

- Provides secure access anytime, anywhere to the data that educational facility professionals need for continuous improvement and organizational excellence
- Places your organization's performance in the context of peer institutions and goal targets to facilitate benchmarking and best practices
- Gives facilities professionals the tools to tell the FM story and show the excellence-journey to campus decision makers
- Ensures focus on all aspects of operations through a balanced scorecard framework

Institutional representatives who complete this survey contribute to full data reporting, which is vital to provide information to advance our effectiveness on campus.

This year you will see a set of Tier I/ executive-level questions that will provide you with a valuable set of strategic measures. You will also be able to respond to the drill-down, detailed questions that are important to know for your facilities operation.

APPA is also introducing a new service for institutions needing assistance in understanding the FPI definitions or in completing the survey. You may contract with APPA to have a Qualified FPI Advisor work with you throughout the data collection process. More information will be available in August.

## Facilities Performance Indicators



## APPA EVENTS – 2008

**Sept 7-11 Institute for Facilities Management**  
Austin, TX. [www.appa.org/training/institute/index.cfm](http://www.appa.org/training/institute/index.cfm)

**Sept 7-11 Supervisor's Toolkit** Austin, TX.  
[www.appa.org/training/toolkit/index.cfm](http://www.appa.org/training/toolkit/index.cfm)

**Sept 12 EFP Prep Course** Austin, TX.  
[www.certification.appa.org](http://www.certification.appa.org)

**Sept 12 or 13 EFP Exam** Austin, TX.  
[www.certification.appa.org](http://www.certification.appa.org)

**Sept 28-Oct 1 ERAPPA Annual Conference**  
Baltimore, MD. [www.erappa.org](http://www.erappa.org)

**Sept 28-Oct 1 RMA Annual Conference**  
Park City, UT. [www.rmappa.org](http://www.rmappa.org)

**Oct 5-8 MAPPA Annual Conference**  
Madison, WI. [www.m-appa.org](http://www.m-appa.org)

**Oct 8-10 PCAPPA Annual Conference**  
Portland, OR. [www.pcapa.org](http://www.pcapa.org)

**Oct 8-11 ACUHO-I/APPA Facilities Housing Conference** Dallas, TX. [www.acuho-i.org](http://www.acuho-i.org)

**Oct 11-15 CAPP Regional Conference**  
Oklahoma City, OK. [www.cappaedu.com](http://www.cappaedu.com)

**Oct 25-28 SRAPPA Annual Conference**  
Charleston, SC. [www.srapa.org](http://www.srapa.org)

**Nov 6-7 AAPPA 2008 Fall Education Conference**  
Halifax, NS. [fm.dal.ca/aappa](http://fm.dal.ca/aappa)

For more information or to submit your organization's event, visit [www.appa.org/calendar/index.cfm](http://www.appa.org/calendar/index.cfm).

## OTHER EVENTS – 2008

**July 12-15 NACUBO Annual Meeting**  
Chicago, IL. [www.nacubo.org](http://www.nacubo.org)

**July 19-23 SCUP's Annual International Conference and Idea Marketplace** Montréal, QC.  
[www.scup.org/annualconf/43/index.html](http://www.scup.org/annualconf/43/index.html)

**July 31-Aug 3 7th Annual UC/CSU/CCC Sustainability Conference** Cal Poly, San Luis Obispo.  
<http://sustainability.calpoly.edu>

**Sept 16-18 Labs21 2008 Annual Conference** San Jose, CA. [www.labs21century.gov/conf/techfair.htm](http://www.labs21century.gov/conf/techfair.htm)

**Sept 21-24 National Recycling Coalition Conference** Pittsburgh, PA. [www.nrc-recycle.org/2008callforpapers.aspx](http://www.nrc-recycle.org/2008callforpapers.aspx)

**Nov 9-11 AASHE National Conference** Raleigh, NC.  
[www.aashe.org/conf2008](http://www.aashe.org/conf2008)

**Nov 19-21 Greenbuild 2008** Boston, MA.  
[www.greenbuildexpo.org](http://www.greenbuildexpo.org)

For more information or to submit your organization's event, visit [www.appa.org/applications/calendar/events.cfm](http://www.appa.org/applications/calendar/events.cfm).



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## Welcome! New APPA Educational Institution Members, 2007-2008

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| Austin Peay State University                             | Clarksville  | TN | SRAPPA |
| Capstone Development Corp.                               | Birmingham   | AL | SRAPPA |
| Central Methodist University                             | Fayette      | MO | CAPPA  |
| Chattahoochee Technical College                          | Marietta     | GA | SRAPPA |
| Chicago School of Professional Psychology                | Chicago      | IL | MAPPA  |
| Connecticut State University System                      | Hartford     | CT | ERAPPA |
| Converse College   | Spartanburg  | SC | SRAPPA |
| Dalton State College                                     | Dalton       | GA | SRAPPA |
| Denver Seminary  | Littleton    | CO | PMA    |
| Downers Grove Grade School District 58                   | DownersGrove | IL | MAPPA  |
| Duke University/Fuqua School of Business                 | Durham       | NC | SRAPPA |
| Ferrum College   | Ferrum       | VA | SRAPPA |
| Gulliver Schools, Inc.                                   | Pinecrest    | FL | SRAPPA |
| Hawaii Community College                                 | Hilo         | HI | PCAPPA |
| Kimball Union Academy                                    | Meriden      | NH | ERAPPA |
| Lancaster General College of Nursing and Health Sciences | Lancaster    | PA | ERAPPA |
| Laramie County School District #2                        | PineBluffs   | WY | RMA    |
| Lawrence Technological University                        | Southfield   | MI | MAPPA  |
| Lees-McRae College                                       | BannerElk    | NC | SRAPPA |
| Lewis University   | Romeoville   | IL | MAPPA  |
| Maryland Institute College of Art                        | Batimore     | MD | ERAPPA |
| Mercer Atlanta University/National Management Resources  | Atlanta      | GA | SRAPPA |
| Morehouse School of Medicine                             | Atlanta      | GA | SRAPPA |
| Mount Saint Mary College                                 | Newburgh     | NY | ERAPPA |
| Mt. San Jacinto Community College                        | SanJacinto   | CA | PCAPPA |
| National College of Natural Medicine                     | Portland     | OR | PCAPPA |
| National Environmental Balancing Bureau                  | Gaithersburg | MD | ERAPPA |
| Natrona County School District #1                        | Casper       | WY | PCAPPA |
| North Carolina School of Science & Mathematics           | Durham       | NC | SRAPPA |
| Northeastern University-Residential Life                 | Boston       | MA | ERAPPA |
| Northwest Missouri State University                      | Maryville    | MO | CAPPA  |
| Nova Scotia College of Art and Design University         | Halifax      | NS | ERAPPA |
| Ohio County Schools                                      | Wheeling     | WV | MAPPA  |
| Penn Museum  | Philadelphia | PA | ERAPPA |
| Pierce County/Facilities Management                      | Tacoma       | WA | PCAPPA |
| Plante Moran Cresa                                       | Southfield   | MI | MAPPA  |
| Robert Morris University                                 | MoonTownship | PA | ERAPPA |
| Rochester Community & Technical College                  | Rochester    | MN | MAPPA  |
| Saint Augustine's College                                | Raleigh      | NC | SRAPPA |
| Saint Meinrad Archabbey                                  | SaintMeinrad | IN | MAPPA  |
| San Francisco Public Library                             | SanFrancisco | CA | PCAPPA |
| Saskatchewan Institute of Applied Science and Technology | Saskatoon    | SK | PCAPPA |
| Skirball Cultural Center                                 | LosAngeles   | CA | PCAPPA |
| Southern New Hampshire University                        | Manchester   | NH | ERAPPA |
| St. Jerome's University                                  | Waterloo     | ON | ERAPPA |
| State of Wyoming, School Facilities Commission           | Cheyenne     | WY | PCAPPA |
| State University Construction Fund                       | Albany       | NY | ERAPPA |
| Texas Tech University Health Sciences Center             | Lubbock      | TX | CAPPA  |
| The Culinary Institute of America                        | St.Helena    | CA | PCAPPA |
| The University of the Arts                               | Philadelphia | PA | ERAPPA |



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# facilities digest

|   |                  |    |        |
|---|------------------|----|--------|
| Touro College   | New York         | NY | ERAPPA |
| Trezevant Manor   | Memphis          | TN | SRAPPA |
| Trinity Christian College                                   | Palos Heights    | IL | MAPPA  |
| University of California/San Francisco-Campus Life Services | San Francisco    | CA | PCAPPA |
| University of Colorado/Colorado Springs                     | Colorado Springs | CO | RMA    |
| University of Illinois at Chicago- Campus Housing           | Chicago          | IL | MAPPA  |
| University of Pennsylvania- School of Veterinary Medicine   | Philadelphia     | PA | ERAPPA |
| University of Puerto Rico - Rio Piedras                     | Rio Piedras      | PR | SRAPPA |
| University of South Alabama                                 | Mobile           | AL | SRAPPA |
| University of the Cumberlands                               | Williamsburg     | KY | SRAPPA |
| University of Washington/ Tacoma                            | Tacoma           | WA | PCAPPA |
| Vanderbilt University                                       | Nashville        | TN | SRAPPA |
| Viterbo University  | Lacrosse         | WI | MAPPA  |
| Walnut Hill School  | Natick           | MA | ERAPPA |
| Wofford College   | Spartanburg      | SC | SRAPPA |
| Yakima County Public Schools                                | Yakima           | WA | PCAPPA |
| York College of Pennsylvania                                | York             | PA | ERAPPA |



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# Mentoring in Facilities Management

By Edwin Robinson

After providing training to the Facilities Management staff of Arizona State University for the past 12 years, I realized that the leaders of Facilities Management comprise individuals that have a tremendous amount of experience in their field. Facilities administration and shop area staff have highly skilled people. Then I asked myself a question: How could this knowledge and experience be easily shared with others? The answer was easy, due to what most companies have embraced in the past ten years. What was my answer? It was mentoring.

Mentoring could generate a continuous cycle of knowledge and skill sharing that would make facilities management departments and shop areas more efficient. Then I asked myself another question: How could this be achieved and supported? The answer is that you would have to tailor a mentoring program that is not disruptive to the mission of the service units within Facilities Management. Additionally, it would have to be mutually beneficial to the directors, managers, supervisors, mentors, and their proteges or mentees.

## THE ADMINISTRATION OF THE PROGRAMS IS THE KEY TO A SUCCESSFUL MENTORING PROGRAM AS FOLLOWS:

- The senior leadership must support the mentoring program and be visible program supporters.
- You have to conduct research to know the percentage of senior managers that will retire within the next five to ten years. Along with your Facilities Management leaders, you should use the soon-to-retire senior managers as mentors. Their knowledge should be retained.
- You can achieve your developmental objectives through the mentoring program.
- The mentor and their protégé must complete a development plan that is achievable for the protégé. How would you do this? The mentor should ask the protégé what they want to achieve from the mentoring relationship. Then the protégé must complete a development plan based on the early meetings. If required, the development plan can be modified during future meetings. The mentor should use the completed development plan to access progress and provide encouragement to the protégé.
  - The mentor and the protégé should agree on the methods for communication.
    - The method should be less hindering for both. For example, should you communicate by phone, e-mail, mail, in person?
    - An agreement should be made on the timeframe to reply from emails and phones messages.



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FACILITY SERVICES



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- Additionally, there should be an agreement on how many times you meet—how often and for how long?
- In order for the mentoring program to work, the protégé should remember and, if applicable, apply the information the mentor told them. The department should provide the resources for the protégé to complete their developmental needs.
- The department, mentor, and protégé should agree on the minimum and maximum time of interaction the mentoring relationship should last. There should be a goal of what needs to be accomplished at the end of the mentoring relationship.
- The Facilities Management administration should assign a Program Coordinator to the mentoring program:
  - The Program Coordinator will evaluate the mentoring program and improve the program as it

**CREATE A MENTORING TEAM TO HAVE PERIODIC MEETINGS WITH THE PROGRAM COORDINATOR. THE MENTORING TEAM SHOULD REPRESENT ALL SERVICE UNITS IN THE DEPARTMENT.**

- gets off the ground. The mentoring program should be evaluated once a year or when a mentoring relationship between the mentor and protégé has ended.
- The Program Coordinator should market the mentoring program that everyone in department is aware of the program.

- The Program Coordinator should facilitate the training of staff paired together in the mentoring program. Some examples of training programs for the mentor and protégé are as follows:
  - Mentors
    - » Building trust among other people
    - » How to utilize effective feedback skills
    - » How to successfully communicate with people from different cultures
    - » How to inspire or motivate others
  - Protégé
    - » Setting goals
    - » How to network efficiently
    - » Effective listening skills
- Create a mentoring team to have periodic meetings with the Program Coordinator. The mentoring team should represent all service units in the department. The team should consist of different cultures so protégés can be paired with mentors that provide comfort to them.
- Create mentor biographies for each service unit within the department. Each biography should include the following:
  - A picture of the mentor
  - Career experiences
  - Personal information
 This will put protégés in the position to choose who they want as their mentor and what career information they want to learn from their mentor. Knowing the personal interest of your mentor may cause an excellent match for the mentor and protégé.
- If either one is uncomfortable with each other, don't force the mentoring program on them. There may be serious morale consequences if the mentor and protégé are forced together.
- Initiate a small number of participants and gradually increase participants over a period of time. In other words, let the department get used to the mentoring program.



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## MENTORING EMPLOYEES MAY PROVIDE THE FACILITIES MANAGEMENT DEPARTMENT WITH THE FOLLOWING:

### DEPARTMENT WITH THE FOLLOWING:

- Your recruitment rates will increase because employees sense that you have an interest in their future.
- Less technical training may be needed because knowledge is shared throughout the department. This could be a tremendous saving to the department budget.
- There will be increased job satisfaction and loyalty to the department. People tend to be loyal to those loyal to them. Mentoring programs create effective job satisfaction by integrating newly hired staff into the department. New employees may immediately feel like part of the team.

## WHEN DO YOU KNOW WHEN TO END THE MENTORING RELATIONSHIP BETWEEN THE MENTOR AND PROTÉGÉ?

- The protégé is constantly asking for information from other people instead of the mentor.
- There are long gaps of time concerning communication from the mentor and protégé. This is a sign that both need time away from each other and feel they no longer need to meet.
- When the protégé is scheduling meetings with other senior leaders and overlook scheduling meetings with their mentor; this may be a sign the mentor has nothing else to offer.
- When all the goals are accomplished in the protégé development plan.

## WHAT ARE THE REWARDS FOR THE MENTOR?

- The mentor may be considered a person that has the ability to recognize and cultivate talent within the department.
- Protégés can help the mentor, within ethical limits, complete work projects and research.
- The mentor will have the satisfaction that they contributed to

LESS TECHNICAL TRAINING MAY BE NEEDED BECAUSE KNOWLEDGE IS SHARED THROUGHOUT THE DEPARTMENT. THIS COULD BE A TREMENDOUS SAVING TO THE DEPARTMENT BUDGET.

another person's life that can be passed on to others.

- Protégés can move up the career ladder beyond the mentor and reward them with job opportunities.

Many companies have adopted mentoring programs because there is valid evidence that mentoring leads to more satisfied employees, increased retention, and a well-skilled workforce. Mentoring programs can only help build work relationships within facilities management departments by creating trust, respect, and possible life-long career

relationships. Skills and experiences can be exchanged from office to office and shop to shop through mentoring programs. 

Edwin Robinson is program coordinator for environmental health and safety at Arizona State University, Tempe, AZ. He can be reached at [edwin.robinson@asu.edu](mailto:edwin.robinson@asu.edu); this is his first article for *Facilities Manager*.

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# Strategic Questions Improve the Facilities Performance Indicators Survey

By Maggie Kinnaman

When I think back over my career in Facilities Management, I must say that I have never been bored. Forwarding the mission of education, research, and community service is an awesome opportunity and one to which Facilities Management can add great value. No

## Facilities Performance Indicators

other administrative department affects the ultimate success of higher education more than Facilities. We touch

each faculty member, researcher, and student every day, all year long. No other campus department can say the same. Our campus community is deeply impacted by the quality of our facilities and that quality deeply impacts the effectiveness of higher education outcomes.

Some say that our only role within Facilities Management is to be a steward of our buildings and infrastructure. Actually, our most important role is to understand the

realities of our largest campus capital asset (buildings and infrastructure) and engage the campus community in a discussion about those realities. We need to share what the realities are, where we are at based on those realities, and ultimately develop a strategy for addressing the realities moving forward. All of this must occur within an environment of competing needs.

I don't know about you, but when I'm placed in such a tenuous position, I try to arm myself with data. Collecting peer information also helps to strengthen the case. So where can you turn for such supporting data?

APPA has spent many years and dedicated significant resources to the task of developing a Web-based Facilities Performance Indicators (FPI) survey and report that can give you the credibility and confidence that you seek. Not only is this survey comprehensive, but it is a fabulous bargain. APPA currently charges only \$125 for up to five Web users at schools that participated in the survey. But it gets better—participants of the 2007-08 FPI survey will have free access to the reports.

After the 2007 FPI Survey was conducted, APPA began working on an initiative called Tier 1 or Strate-

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gic Facilities Questions. The need to introduce a new set of questions arose from information gleaned by member participants of the 2007 FPI Survey. It became clear to APPA that every SFO (Senior Facilities Officer) representing campuses of all sizes and complexities, needed to focus on the most important data concerning campus management. These members were surveyed in order to better understand which types of questions would be most important/strategic for them and their key campus administrators to know.

The other benefits that will be derived from Tier 1 questions include the enabling of small facilities operations to participate at an effort level that can be afforded in terms of cost and time. APPA

**MOVING BEYOND THE BASICS, IF YOU WANT CREDIBLE DATA THAT IDENTIFIES THE OVERALL CONDITION OF YOUR CAMPUS, TAKE A LOOK AT THE STRATEGIC FINANCIAL MODULE AND SPECIFICALLY THE DEFERRED MAINTENANCE BACKLOG, CURRENT REPLACEMENT VALUE AND RENOVATION, MODERNIZATION AND ADAPTATION DATA POINTS.**

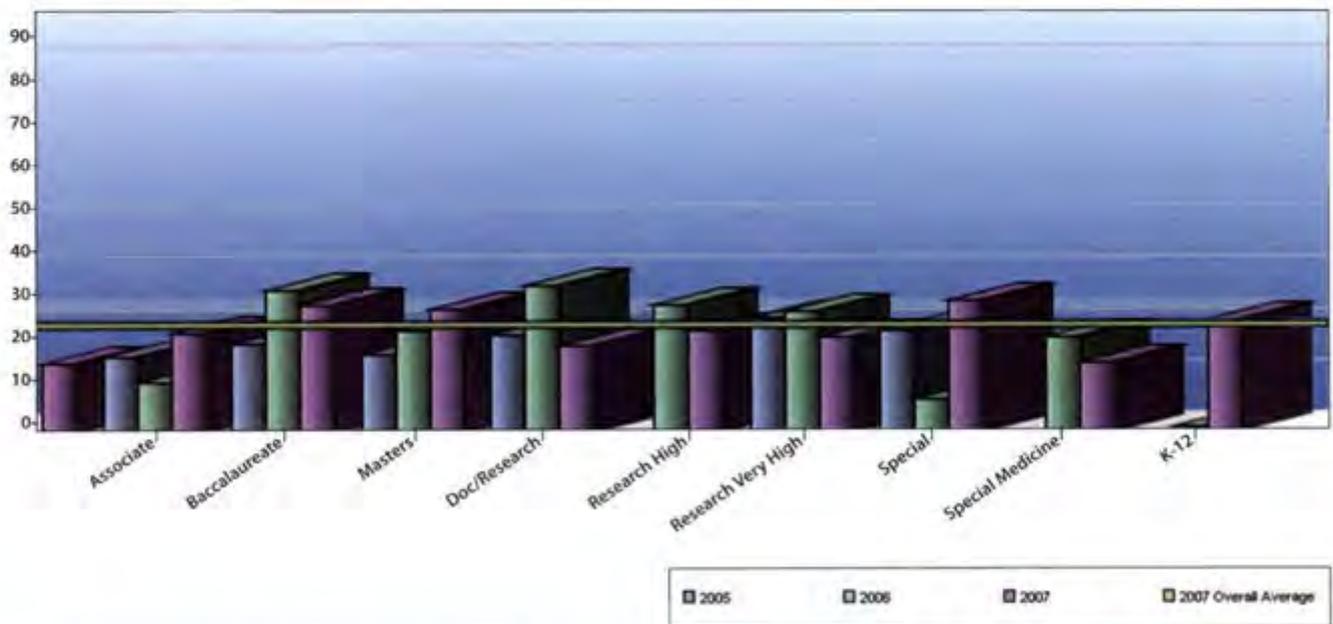
also recognizes that most growth in FPI participation will come from the smaller school sectors and APPA wants to continue to encourage peer to peer comparisons which can only be achieved with increased participation in the survey.

If you're a new participant and cannot complete the entire survey the first year, complete the Tier 1 and the General

Module questions at the very least and then you can pick and choose those indicators that are most important to your campus.

Moving beyond the basics, if you want credible data that identifies the overall condition of your campus, take a look at the Strategic Financial module and specifically the Deferred Maintenance

Needs Index—Averages summarized by: Carnegie Class—Fiscal Year 2006-07 APPA FPI Report



|                             | ASSOCIATE | BACCALAUREATE | MASTERS | DOC/RESEARCH | RESEARCH HIGH | RESEARCH VERY HIGH | SPECIAL | SPECIAL MEDICINE | K-12   |
|-----------------------------|-----------|---------------|---------|--------------|---------------|--------------------|---------|------------------|--------|
| <b>2005</b>                 | 14.48     | 16.94         | 15.07   | 18.66        |               | 21.97              | 19.32   |                  |        |
| <b>2006</b>                 | 9.802     | 27.102        | 19.29   | 28.192       | 24.353        | 23.005             | 6.43    | 18.023           | 0.95   |
| <b>2007</b>                 | 18.929    | 24.483        | 23.474  | 16.46        | 19.413        | 18.408             | 25.335  | 13.314           | 21.53  |
| <b>2007 OVERALL AVERAGE</b> | 20.693    | 20.693        | 20.693  | 20.693       | 20.693        | 20.693             | 20.693  | 20.693           | 20.693 |

Backlog, Current Replacement Value and Renovation, Modernization and Adaptation data points. By completing these data points, you will get reports that indicate a Needs Index Ratio that describes the percentage of your campus that does not adequately support programmatic needs.

If you want a better picture of how

**IF YOU WANT A BETTER PICTURE OF HOW YOU'RE DOING WITH THE RESOURCES PROVIDED, CHECK OUT THE FINANCIAL OPERATIONS MODULE AND ANSWER THE QUESTIONS RELATED TO MAINTENANCE, CUSTODIAL, AND GROUNDS EXPENSE.**

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you're doing with the resources provided, check out the Financial Operations module and answer the questions related to maintenance, custodial, and grounds expense. Make sure you complete the entire section to include the GSF or Acres supported by these programs. The resultant reports will give you data about your program, your program compared to an overall average as well as a variety of functional groups.

As a participant in the survey, you also have access to the contact information of other participants. This enables you to call and discuss operational differences such as level and frequency of service.

The bottom line is clear, if you're just starting out, you can't eat the elephant all at once but you certainly can have an appetizer. Next year, you can add additional indicators and before you know it, you will be armed with compelling data. As Thomas Edison put it, "Opportunity is missed by most people because it is dressed in overalls and looks a lot like work."

I'm encouraging you to put on those overalls and take full advantage of a fantastic opportunity. By participating in the FPI survey and receiving the accompanying reports, you will surely enhance your competence and credibility. ☎

Maggie Kinnaman is director of business administration for facilities at the University of Maryland, Baltimore, and a past APPA President. She can be reached at [mkinnaman@af.umaryland.edu](mailto:mkinnaman@af.umaryland.edu).

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# Educational WRAP-UP

## APPA OFFERS WEEK-LONG PROFESSIONAL DEVELOPMENT AND TRAINING IN ARIZONA

By Suzanne Healy

**A**PPA's most recent week of professional development was hosted by the town of Scottsdale, Arizona. Facilities professionals from around the world participated in a week long program that offered educational training in individual effectiveness skills, interpersonal effectiveness skills, managerial effectiveness skills and organizational skills at APPA's Leadership Academy as well as supervisory training at APPA's Supervisor's Toolkit: Nuts and Bolts of Supervision. The continued success of this delivery is due to the dedicated faculty and trainers who continue to raise the level of professional development allowing APPA to provide top notch offerings. A special thanks to the faculty of the Academy: Lander Medlin & Glenn Smith representing Track I; Ann Jenkins representing Track II; James Cole, David Judge and Matt Adams representing Track III; and Jack Hug, Doug Christensen, Maggie Kinnaman and Tom Stepnowski representing Track IV. Without their expertise and dedication, we would not be able to provide the outstanding quality that we do at the Academy and Supervisor's Toolkit.

Within this week, the Supervisor's Toolkit Trainers were absorbed in providing the newest techniques for those who may be new to a supervisor role in facilities or who just needed to brush up on some skills. A successful session was had by the participants and special thanks to their trainers, Wally Glasscock and Nancy Yeroshefsky.

Our week of events concluded with a celebration to mark the completion of a week of hard work by all and to congratulate the work of those who officially graduated from the Academy. The Class of April 2008 consisted of 22 who proudly participated in



PHOTOS BY RYNDRA HOLE



Wednesday's evening festivities. (List of graduates and Toolkit participants next page.)

We had a week of outstanding training, wonderful networking while visiting with old friends, and meeting new colleagues. We look forward to seeing all of you at the next APPA professional development opportunity. For the latest dates of registration, please visit [www.appa.org](http://www.appa.org). 

Suzanne Healy is APPA's director of professional development. She can be reached at [suzanne@appa.org](mailto:suzanne@appa.org).

## April 2008 Institute Graduates

*Leon J. Bivens Sr.*, University of Maryland Eastern Shore  
*William F. Boyer*, Salisbury School  
*John F. Bracamonte*, Pima Community College  
*Jeffrey Davis*, Montana State University  
*B. Kevin Falsom*, Dallas Theological Seminary  
*Richard Furter*, University College London  
*Steve Glazner*, APPA  
*Doris M. Hall*, Reed College  
*Frances Haney*, University of California/Los Angeles  
*Cecilia A. Madrid*, University of Arizona  
*Carnie A. McNamara-Segal*, Arizona State University  
*John O'Shaughnessy*, St. Paul's School  
*Alvin Payne*, University of Tennessee  
*Cody L. Powell*, Miami University  
*Olen Pruitt*, University of Alabama/Birmingham  
*Shelton Riley*, Texas Christian University  
*Minerva Rivera*, New Mexico State University  
*Michael Roland*, University of Houston/Victoria  
*William Kent Stryan*, Tartleton State University  
*Dorothy A. Vezo*, University of Arizona  
*William M. Wise*, Colorado College  
*Joseph R. Wojtyciak*, Harrisburg Area Community College

## April 2008 Toolkit Participants

*Gary Antineriala*, Worcester Polytechnic Institute  
*Craig Bell*, California State University/Los Angeles  
*William Canizales*, University of Arizona  
*Robert Dandeleit*, Stanford University  
*Joe Daugherty*, University of Arizona  
*Heather Dodd*, Western Washington University  
*Frank Fimbres*, University of California/Merced  
*Keith Gregory*, Portland Community College  
*Milton Halley*, Georgia Tech Research Institute  
*Andrew Huffman*, University of North Carolina/Greensboro  
*Garnet Jarvis*, Ryerson University  
*Anthony Jones*, Johns Hopkins University/Applied Physics Lab  
*John MacMillan*, Groton School  
*Richard Magere*, University of Rochester  
*Diane Martinez*, San Mateo County Community College District  
*Stewart McCray*, California State University/Fullerton  
*Tal Meidinger*, University of Lethbridge  
*Saul Nanez*, University of Texas/El Paso  
*Robert Parham*, University of Texas/El Paso  
*Robert Pepin*, Worcester Polytechnic Institute  
*Sam Peters*, Georgia Tech Research Institute  
*Osama Rammaha*, University of Missouri/St. Louis  
*Eric Schott*, University of Miami/Coral Gables  
*Herbert Stokes*, Georgia Tech Research Institute  
*Leo Taylor*, University of Arizona  
*Erik Towns*, University of Nevada/Las Vegas  
*Jim Vanderzee*, University of Lethbridge  
*Brad Williams*, University of Utah

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It's Not  
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# Leader's Vision



By James M. Kouzes and  
Barry Z. Posner

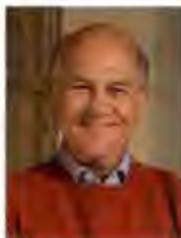
At some point during all this talk over the years about the importance of being future-oriented, leaders got the sense that they were the ones that had to be the visionaries. Often with the encouragement of a lot of leadership developers, including us, leaders came to assume that if others expected them to be forward-looking, then they had to go off all alone into the wilderness, climb to the top of some mountain, sit in the lotus position, wait for a revelation, and then go out and announce to the world what they foresee. Leaders have assumed that it's their vision that matters, and if it's their vision then *they* have to create it.

Wrong! This is *not* what constituents expect. Yes, leaders are expected to be forward-looking, but they aren't expected to be prescient or clairvoyant. Exemplary leadership is not about uttering divinely inspired revelations. It's not about being a prophet.

What people really want to hear is not the leader's vision. They want to hear about *their own* aspirations. They want to hear how their dreams will come true and their hopes will be fulfilled. They want to see themselves in the picture of the future. The very best leaders understand that their key task is inspiring a *shared* vision, not selling their own idiosyncratic view of the world. Buddy Blanton, a principal program manager at Rockwell Collins Display Systems, learned this lesson firsthand. He got his team together one morning to give him feedback on his leadership practices. He specifically wanted to learn how he could be more effective in creating a shared vision. What they told him helped him understand that it's the process and not just the vision that's critical in getting people all on the same page.

*One of the team members that I most respect spoke first. She is very good at telling it like it is, but in a constructive manner. She provided me the following feedback: "You have all of the right skills," she said. "You have global vision and understanding. You are a good, sincere listener. You are optimistic, and you command the respect and trust of your team and your colleagues. You are open and candid, and you are never shy about saying what needs to be said to team members." Then she gave me this advice, "You would benefit by helping us, as a team, to understand how you got to your vision. We want to walk with you while you create the goals and vision so we all get to the end vision together."*

*Another team member said that sharing this road map would help him to feel more able to take the initiative to resolve issues independently. A couple of other team members stated that this communication would help them to understand the realism of the goals. Other team members said that they would like to be a part of the vision-building process so they could learn how to better build visions for their team.*



Jim Kouzes was a keynote speaker at APPA 2008: The Rise to Greatness

I looked at the group. It was clear that they were in agreement that they wanted to be a part of the vision sharing and development process. We launched into a discussion on our vision for the program, and each person contributed to the discussion. I asked them if it would be useful if we got together every two weeks to discuss and build our program vision, similar to what we did that day. The feedback was a resounding Yes.

The vast majority of us are just like Buddy's team members. We want to walk *with* our leaders. We want to dream *with* them. We want to invent *with* them. We want to be involved in creating *our* own futures. This doesn't mean you have to do exactly what Buddy did, but it does mean that you have to stop taking the view that vision comes from the top down. You have to stop seeing it as a monologue, and you have to start engaging others in a collective dialogue about the future.

#### YOU HAVE TO SEE WHAT OTHERS SEE

To be able to describe a compelling image of the future, you have to be able to grasp what *others* want and need. To appeal to others and to show them how their interests will be served, you have to know their hopes, dreams, motives, and interests.

That means you have to know your constituents, and you have to speak to them in language they will find engaging. If you're trying to mobilize people to move in a particular direction, then you've got to talk about that future destination in ways that your audience will find appealing.

The kind of communication needed to enlist others in a common vision requires understanding constituents at a much deeper level than we normally find comfortable. It requires understanding others' strongest yearnings and their deepest fears. It requires a profound awareness of their joys and their sorrows. It requires intimacy, familiarity, and empathy. It requires experiencing life as they experience it.

Being able to do this is not magic, nor is it rocket science. It really just calls for listening very, very closely to what other people want.

Now at this point you may be saying to yourself, "All well and good, but what about breakthrough innovations. Aren't leaders supposed to focus on the next new thing? Nobody ever said they wanted an airplane or telephone or personal computer!" True, but people did say they wanted to travel faster to more distant places, connect more easily with their friends and family, and work more productively.

We'd submit that these innovations were not and are not the result of hermits who come up with ideas in isolation. They are, in fact, the result of superb and attentive listening. They are the result of being closely attuned to the environment. They are the result of a greater appreciation of people's aspirations.

What breakthrough innovators and exemplary leaders understand is that *all* of us want a tomorrow that is better than today. We don't necessarily all want exactly the same thing, but whatever we want, we want it to be an improvement. The critical skill is in discovering just what "new and improved" means to others.

If you're going to stir the souls of your constituents, if you are going to lift them to a higher level of performance, then here's what you need to know: It's not the leader's vision, it's the people's vision that matters most. ☺

Jim Kouzes and Barry Posner are coauthors of over a dozen books on leadership, including the award-winning and best-selling book, *The Leadership Challenge*, now in its fourth edition. Kouzes is the Dean's Executive Professor of Leadership, and Posner is the Dean of the Leavey School of Business, Santa Clara University (located in the heart of Silicon Valley, USA). They can be reached at [www.leadershipchallenge.com](http://www.leadershipchallenge.com). This is their first article for *Facilities Manager*. Copyright 2008, John Wiley & Sons; all rights reserved.

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**WHAT  
WEB**

**2.0**

**MEANS TO**

**Facilities**

**PROFESSIONALS**

By Scott Allen

## It's official – the Web is now social.

Actually, it's always been social to a degree, but now it's *mostly* social. According to Comscore, the number of worldwide visitors to social networking sites in the past year exceeds 530 million, almost two out of every three Internet users. In some countries, such as the UK, social networking sites account for more than 75 percent of all Web traffic. Even those sites that are ostensibly commerce-oriented have a growing number of social features.

A lot of terms have been coined or adopted to describe various aspects of this phenomenon – social media, social networking, consumer-generated media (CGM) and Web 2.0. While it's hard to define *exactly* what Web 2.0 is, or when Web 1.0 ended, it's clear that the Web today feels very different than it did five years ago.

While it may be impossible to describe Web 2.0 in a single sentence, there are a few broad brushstrokes that can help paint the picture:

1. **Web 2.0 is social.** People now look for answers from other people. Web users are now inclined to trust the collective opinions of their friends or “people like themselves” as much or more than advertisers, critics and other official sources. Web users want to develop, track and leverage relationships over time, not just a single transaction. And when static information and automated tools fail to provide quick solutions, they turn to real people, whether from official sources or informal social networks.
2. **Web 2.0 is open.** In Web 1.0, you generally had the assumption of privacy, i.e., it was assumed that you generally wanted privacy and would only share your information and content on a limited basis. In Web 2.0, there is an assumption of openness. If you create a social networking profile, unless

you specify it as private, it will be open to the world. Even if you're not producing content yourself, if you have any social or business life at all, others are creating it about you. You're better off realizing this and learning how to deal with it responsibly rather than trying to fight it.

3. **Web 2.0 is quick and easy.** Web 2.0 enables users to do things that used to require a webmaster or developer. Blogging, for example, doesn't really enable anything that couldn't have been done previously, but it's an order of magnitude simpler now. A variety of data feeds and other embedded applications can be added to a Web page or social networking profile with a click of a button or copying a single line of code. Applications that would have taken months to develop now take days. Let's look now at some of the specific ways facilities professionals can leverage this technology:

- **Recruiting** – While general job boards like Monster and niche boards like APPA's Job Express are still essential tools, increasingly hiring managers and recruiters are using professional networking sites like LinkedIn to tap into the vast market of passive candidates. Heavy participation is not required, but at a minimum you want to connect with your past coworkers and other professional colleagues.
- **Showcasing your work** – Are you doing great work in your organization? A blog is an effective way to communicate that to your institution, students and the public. The big stuff may garner awards or merit press releases, but the day-to-day stuff tends to get overlooked. Telling success stories from your organization will enhance both your personal reputation and that of your institution. Check out UC San Diego's Greenest University blog at <http://greenestuniversity.blogspot.com>.
- **Dialog with your stakeholders** – Web 2.0 enables conversations. Want open, frank feedback about your facilities and related services? Give students and teachers a virtual



space to talk about it. You'll get far better input than you will via private feedback alone. Virginia Commonwealth University, for example, uses a blog to solicit suggestions about their library: <http://blog.vcu.edu/libsuggest>.

- **Knowledge sharing** – Some questions just can't be answered with a Google search. If you're looking for peer feedback to help you with a challenging problem, try the APPAinfo discussion list. Or for niche expertise in other areas, LinkedIn's Answers feature can be an invaluable resource. And by participating and answering questions, you can hone your own skills,

build relationships and enhance your professional reputation.

- **Build campus relationships** – A growing number of educators and administrators are discovering that by participating in student-preferred social networking sites like Facebook and MySpace, they are building stronger relationships with their students and even with each other.
- **Application development** – Publicly available tools enable the rapid creation of any number of useful applications for facilities management. For example, did you know that you can add locations from your campus in the public Google Maps? Or

that you can use their application and your own campus maps to create an interactive map that works just like Google Maps? Want to see it in action? Check out Iowa State's interactive campus map at <http://www.fpm.iastate.edu/maps>.

- **Professional development** – Participating in social media in your industry is a good way to keep up with current industry trends and issues, build your reputation, meet new people and generate publicity opportunities for yourself and your organization. If you don't want to maintain a blog of your own, you could try your hand at being a guest blogger. See the *Chronicle of Higher Education's* Building & Grounds Blog for an example: <http://chronicle.com/blogs/architecture>.

This is just a sampling of the potential ways Web 2.0 can help you be more effective in your job and career. Any business function that can be enhanced by relationships can be enhanced by virtual relationships. Once you realize that and detach yourself from the idea that "real" relationships only take place face-to-face, you'll discover a web of opportunity awaits you. ☺

Scott Allen is managing partner of Link to Your World LLC, a consulting firm that helps organizations transform virtual relationships into real business. He is coauthor of *The Virtual Handshake: Opening Doors and Closing Deals Online* and *The Emergence of The Relationship Economy*. To learn more, visit [www.cornerstonespeakers.com](http://www.cornerstonespeakers.com). He will be speaking at the APPA 2008 annual conference on the topic of "Mastering Web 2.0 and the New Age of e-Business." This is his first article for *Facilities Manager*.

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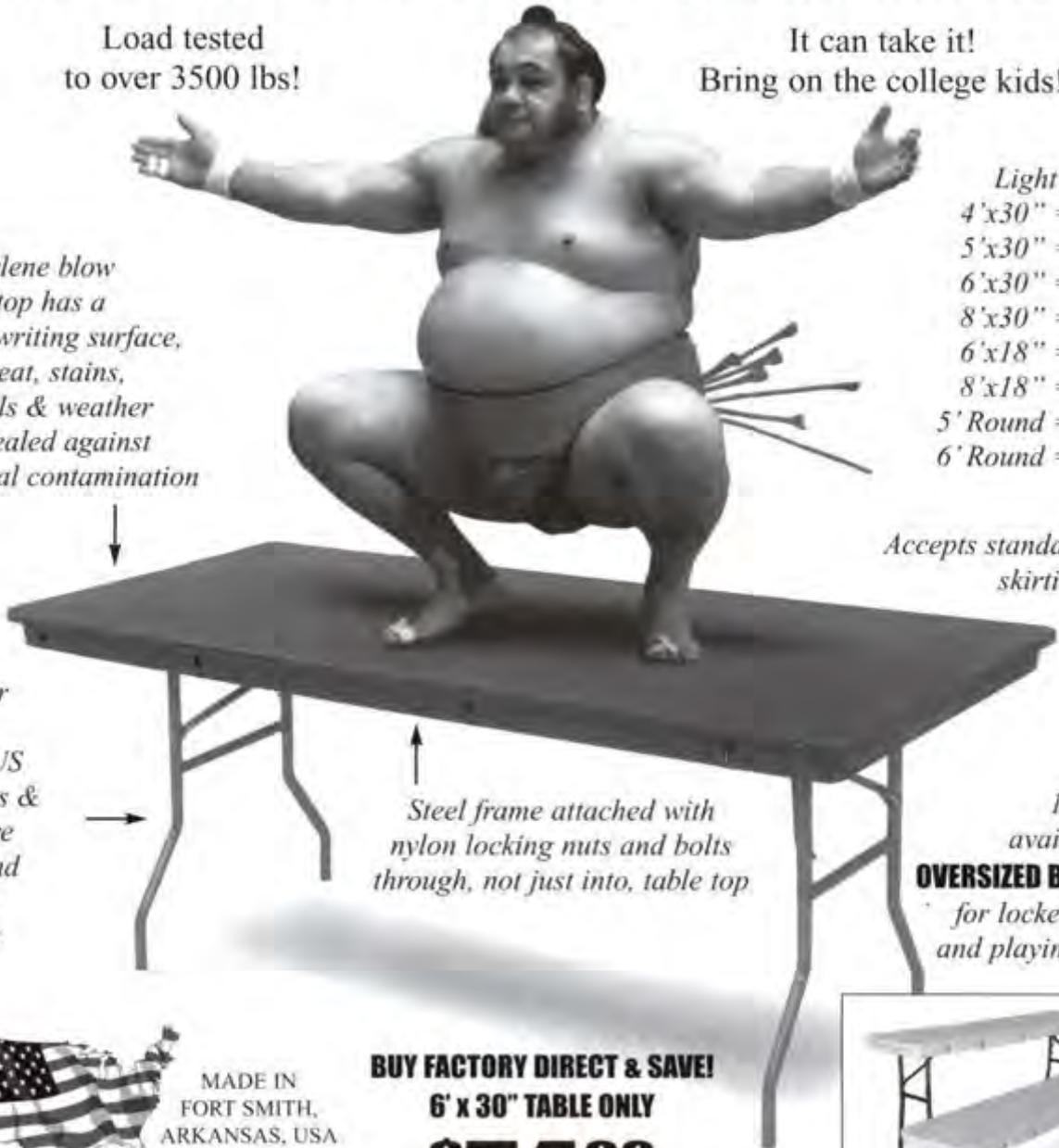
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# Cleanliness



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# & Learning in Higher Education

In 1992 APPA published a seminal work titled *Custodial Staffing Guidelines for Educational Facilities*. The work was based on a concept that was in the embryonic stage in 1986 and then grew in momentum through 1988 when the APPA Board of Directors commissioned a task force to address custodial staffing issues at institutions of higher education. The *Guidelines* became so popular that it was revised in 1998. The two editions addressed a critical need in facilities management at educational

institutions. Even though institutions were growing in size and in delivery of services, custodial staffing budgets were either staying static, or in many cases, decreasing. In other words, each custodian was being asked to clean more square feet than ever before. The facilities managers did not have an empirical document to fall back on that indicated how many custodians were really needed to complete the tasks at hand and the impact of such on productivity or cleanliness.

By Jeffrey L. Campbell, Ph.D.,  
and Alan S. Bigger, M.A.

The *Guidelines* became that document and defined five levels of cleanliness and clearly stated that as the square feet of area assigned to a custodian increased, there was a direct impact on the level of cleanliness. The second edition of the *Guidelines* clearly identifies this phenomenon. According to the book's staffing service levels chart, a custodian can clean 87,000 square feet of carpet office space at level 5. However, you get what you pay for at level 5, where the level of cleanliness defined as "Unkempt neglect – floors and carpets are dull and dirty, dingy, scuffed, and/or marred. There is conspicuous buildup of old dirt...." The research for the *Guidelines* shows the impact of decreasing custodial staffing: Less staff results in dirtier spaces.

The findings of the *Guidelines* are based upon the feedback of hundreds of individuals and institutions. In addition, the expertise of professional organizations such as ISSA, the worldwide cleaning industry association, was integrated into the publication. The *Guidelines* have been in use for over two decades by an ever-increasing number of institutions to validate staffing requirements and to justify the need for custodial budgets.

Even though the *Guidelines* addressed staffing levels and the impact of staffing levels on cleanliness, *it did not address the impact of cleanliness on the students that were involved in higher education.*

If there was an impact of staffing levels on cleanliness, could the

case be made that there was an impact of the levels of cleanliness on an individual student's ability to learn? Representatives from ISSA and APPA started to ponder these issues a few years ago.

#### BACKGROUND INFORMATION

In 2005, representatives from APPA and ISSA met to discuss conducting collaborative projects that would enhance the facilities management profession. After considerable discussion, the two associations decided to concentrate on cleanliness in higher education institutions and the impact that cleanliness has on student performance. The representatives concluded that a study should be conducted that would seek to determine if there was any correlation between the five levels of cleanliness and student performance. Such documentation would provide unique insights for facilities services providers.

The representatives from APPA and ISSA met several times to clarify the direction of the research project. They concluded that the project should be coordinated through APPA's Center for Facilities Research (CFaR). Bigger applied for approval through CFaR for the research project to be conducted by Jeff Campbell of Brigham Young University (BYU), the students of BYU's Facilities Management Program, and Bigger. CFaR accepted the project and APPA, in concurrence with ISSA,

agreed to fund and support the project that would seek to:

- Determine if there is a correlation between the five levels of cleanliness and student learning.
- Determine if there is a link between personal health and cleanliness.

#### LITERATURE REVIEW

There were nine empirical research studies identified that sought to discover whether there was a relationship between the condition of school buildings and student academic achievement. Each study was conducted in a K-12 school environment, and in all cases the academic achievement of students was measured by scores on standardized tests. Most of the studies were motivated to determine how the governing body should allocate funds to maintain and refurbish its schools. (Though other studies were identified, all referenced back to one or several of these nine seminal studies.) No studies were identified that conducted research for institutions of higher education, nor did the literature review identify stud-

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ies that specifically measured a relationship between the cleanliness of the study environment and student academic achievement. These studies strongly support a positive correlation between school building conditions and student achievement (Bernier, 1993; Berry, 2002; Cash, 1993; Earthman, 1995; Hines, 1996; Stevenson, 2001). Other variables such as building age, student attendance, and teacher retention were considered by various researchers (McGuffey, 1982; Stevenson et al, 2001; Buckley, 2005). However, the levels of cleanliness and the impact on a student's ability to learn or performance were not addressed. *[Ed. Note: The full research report with all cited references is available at [www.appa.org/](http://www.appa.org/)]*

In other words, each  
custodian was being asked  
to clean more square  
feet than ever before.

#### METHODOLOGY

APPA has membership from approximately 1,200 institutions of higher education. There are about 4,500 institutions of higher education in the United States. An alphabetical database of APPA's institutional members and representatives was initially used by the researchers with every 60th institution selected to participate in the study. The goal was to have 20 institutions participate in the 20-question survey. When an institution did not respond or otherwise declined to participate, researchers went to the next institution on the list. Each institution was asked to obtain clearance for the research from their respective institutional research board (IRB). Each institution was asked to either provide a list of e-mails of a random sample of students or to send the survey to a random sample of students at their institution. SurveyMonkey, an online survey instrument, was used to distribute and collect the surveys.

Bigger and Campbell met with BYU students and later with Dianna Bisswurm (ISSA) in early April 2007 to clarify the direction of the project. When Campbell and Bigger met to direct the project, it was determined that the ideal methodology to measure student academic achievement would be to collect grade point averages from students (with the assistance of school registrars) based upon a random selection of students at participating institutions. However, we determined that issues of privacy would preclude this approach and that it would be too cumbersome and time consuming. Thus it was decided to randomly select institutions, and then send surveys to their student body utilizing lists of e-mail addresses provided by the institution. In most cases,

the institutions became the deliverer of the survey document, because participants preferred this approach.

The second challenge that emerged was finding the right source of contact at each institution to be the "lead" for the survey. Initially it was felt that the institutional representative of APPA at each participating institution should be the contact person (as discussed later); however, reality dictated that the primary contact for such a process should be the institution's research board or equivalent. Once this was determined, the process of disseminating the survey became much easier. A considerable amount of time and effort was expended on trying to contact the right people and offices to receive approval and distribution of the survey.

Receiving approval for the implementation of the project at all randomly selected institutions also presented significant challenges. Not only was it difficult to find the right contact, it was also problematic to receive approval from some institutional research offices, due in part to the fact that many institutions were receiving too many surveys or that the timing of this particular research did not fit with the calendar of research at the institution.

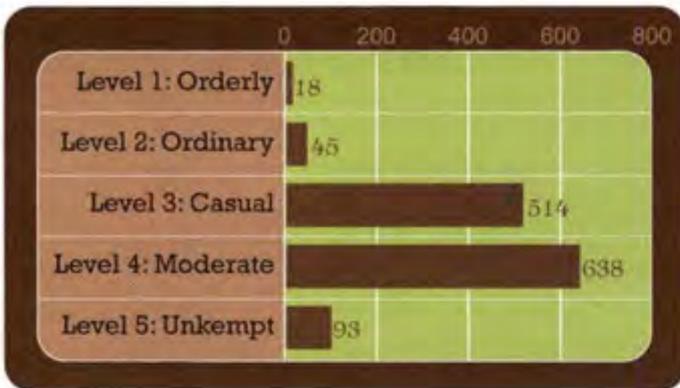
The research methodology began as planned. All APPA institutional representatives were contacted by e-mail and telephoned several times over the period of three months. Most declined to participate because it was either too hard to get IRB approval or because too many surveys were already planned for fall 2007. We discovered that having the APPA institutional representative seek IRB approval was not the best method because they do not perform research on a regular basis. It would have been more effective to go directly to each institution's research board.

Given that the desired response was not obtainable, it was determined that the best alternative was to accept those institutions that had agreed to participate and select others that would represent varying geographical areas of the U.S., and different sizes of public and private institutions. In addition, even though the researchers did not receive approval to survey 20 schools as originally planned, the fact that the student base of higher education institutions comes from scattered areas of the U.S. and many foreign countries led us to surmise a broad sampling of student perspectives and attitudes would still be possible. Dr. Dennis Eggett, director for the Center for Statistical Consultation and Collaborative Research at BYU, determined that a sample size of 1,000 would provide a qualified sample.

#### RESPONSES TO SOME SURVEY QUESTIONS

More than 1,400 surveys were received from students attending institutions from the West, Midwest, East, and South United States. Three of the institutions were public and two private. The institutions ranged in size from 1,185 to more than 34,000 students. Students provided 892 comments on how cleanliness affects their health, and 681 comments on how to improve campus cleanliness. The survey instrument, numerical responses, and written responses are included in the complete study. Some key questions and results include:

Q11. At what level do you feel that the cleanliness of campus buildings would begin to be a distraction to your ability to learn?



|                                |       |
|--------------------------------|-------|
| Level 1 – Orderly Spotlessness | 1.4%  |
| Level 2 – Ordinary Tidiness    | 3.4%  |
| Level 3 – Casual Inattention   | 39.3% |
| Level 4 – Moderate Dinginess   | 48.8% |
| Level 5 – Unkempt Neglect      | 7.1%  |
| N=1308                         |       |

Q12. What level of cleanliness of campus buildings do you consider sufficient to create a good learning environment?



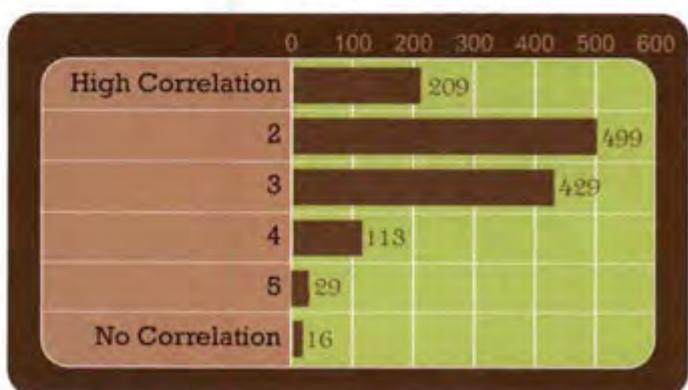
|                                |       |
|--------------------------------|-------|
| Level 1 – Orderly Spotlessness | 9.5%  |
| Level 2 – Ordinary Tidiness    | 74.1% |
| Level 3 – Casual Inattention   | 14.4% |
| Level 4 – Moderate Dinginess   | 1.7%  |
| Level 5 – Unkempt Neglect      | .3%   |
| N=1314                         |       |

Q15. How important is cleanliness to your learning environment? (1 = Very important, 6 = Not important)



|                  |       |
|------------------|-------|
| 1 Very Important | 26.5% |
| 2                | 43.3% |
| 3                | 22.5% |
| 4                | 4.9%  |
| 5                | 1.7%  |
| 6 Not Important  | 1.0%  |
| N=1296           |       |

Q16. What level of correlation do you think exists between building cleanliness and student's ability to learn? (1 = High Correlation; 6 = No correlation)



|                    |       |
|--------------------|-------|
| 1 High Correlation | 16.1% |
| 2                  | 38.5% |
| 3                  | 33.1% |
| 4                  | 8.7%  |
| 5                  | 2.2%  |
| 6 No Correlation   | 1.2%  |
| N=1295             |       |

**Q13.** Rank the following *building elements* in order of the perceived impact to your personal learning (1 = Highest Impact, 8 = Lowest Impact). Each number can only be used once.

|                       | Highest Impact | 2           | 3           | 4           | 5           | 6           | 7           | Lowest Impact | Mean | Response Count |
|-----------------------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|------|----------------|
| Noise Level           | 51.8% (664)    | 18.6% (239) | 11.2% (144) | 5.9% (75)   | 4.9% (63)   | 2.9% (37)   | 2.7% (35)   | 2.0% (25)     | 2.23 | 1282           |
| Air Temperature       | 18.1% (231)    | 31.0% (396) | 19.0% (243) | 12.4% (158) | 7.0% (90)   | 6.1% (78)   | 4.2% (54)   | 2.3% (29)     | 3.06 | 1279           |
| Condition of Facility | 4.8% (61)      | 7.9% (100)  | 11.9% (151) | 19.2% (243) | 21.2% (268) | 19.4% (246) | 10.0% (127) | 5.5% (70)     | 4.70 | 1266           |
| Cleanliness           | 3.5% (44)      | 7.9% (100)  | 18.2% (231) | 22.2% (281) | 21.2% (269) | 16.3% (206) | 8.5% (108)  | 2.1% (27)     | 4.43 | 1266           |
| Cosmetic Appearance   | 1.1% (14)      | 1.2% (15)   | 1.9% (24)   | 5.1% (65)   | 10.4% (132) | 14.5% (184) | 27.4% (348) | 38.5% (489)   | 6.58 | 1271           |
| Furniture Arrangement | 1.1% (14)      | 2.3% (29)   | 4.1% (52)   | 7.0% (90)   | 9.6% (123)  | 12.6% (162) | 28.2% (361) | 35.1% (450)   | 6.48 | 1281           |
| Available Space       | 8.7% (112)     | 12.0% (155) | 14.1% (181) | 15.8% (203) | 13.2% (170) | 18.5% (238) | 11.9% (153) | 5.8% (75)     | 4.45 | 1287           |
| Lighting              | 11.5% (149)    | 19.4% (252) | 20.5% (266) | 13.6% (176) | 13.3% (172) | 9.9% (128)  | 6.4% (83)   | 5.5% (72)     | 3.81 | 1298           |

N=1310

Statistical Mean Ranking:

- #1 – Noise Level (2.23)
- #2 – Air Temperature (3.06)
- #3 – Lighting (3.81)
- #4 – Cleanliness (4.43)
- #5 – Available Space (4.45)
- #6 – Condition of Facility (4.70)
- #7 – Furniture Arrangement (6.48)
- #8 – Cosmetic Appearance (6.68)

| Ranking |   |
|---------|---|
| Q1      | 2.23 Noise level  |
| Q2      | 3.06 Air temperature<br>3.81 Lighting<br>4.33 Cleanliness<br>4.45 Available space<br>4.70 Condition of facility |
| Q3      | 6.48 Furniture arrangement<br>6.68 Cosmetic appearance  |
| Q4      |   |

**Q17.** At what level do you think students should be involved in keeping campus buildings clean? (1 = Very Involved; 6 = Not involved at all)



|                       |       |
|-----------------------|-------|
| 1 Very Involved       | 16.2% |
| 2                     | 34.1% |
| 3                     | 29.6% |
| 4                     | 13.5% |
| 5                     | 4.6%  |
| 6 Not Involved at All | 2.0%  |

N=1296

**Q18.** Do you believe that the cleanliness of campus facilities has an impact on your health?



Yes 78.1%  
No 21.9%  
N=1293

#### COMMENTS AND RECOMMENDATIONS

Based upon the literature review and analysis of the 20 questions (not all listed in this summary report) several recommendations and conclusions can be offered.

The literature review shows ample evidence that there is a positive correlation between school building conditions and academic achievement. Unfortunately, building conditions are viewed holistically and not divided into specific elements. Measuring building condition is a subjective practice and can have alternative motives for gaining capital funding. Building age is also a strong indicator of building condition.

Poor building conditions, including inadequate custodial service have shown a correlation to low student attendance. Student attendance is a significant variable in predicting academic scores on standardized tests.

Building conditions also have an impact on teacher attendance and retention. Quality teachers are important to sustaining high student scores. Building conditions ranked higher in one study than teacher salaries.

**Recommendation #1: Building conditions including custodial service should be considered an important factor in student academic achievement.**

Q.14 asked the students to identify the learning space where they thought they learned best. The overwhelming response was classroom space followed by library space and personal living space.

**Recommendation #2: Given that classrooms were ranked #1 as students' most effective space to learn, classrooms should receive proper cleaning attention at level 2 (ordinary tidiness).**

Over a third of the respondents said that the lack of cleanliness became a distraction at a level 3 (casual inattention). Almost half of the respondents said that the lack of cleanliness became a distraction at a level 4 (moderate dinginess); 74.1 percent of the respondents indicated that their desired level of cleanliness is a level 2 (ordinary tidiness).

**Recommendation #3: Be concerned about learning space cleanliness that drop to levels 3 (casual inattention) and level 4 (moderate dinginess).**

Eighty percent of the students said that they should be very to moderately involved in keeping campus buildings clean. Only 20 percent of the students



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reported negatively about being involved in campus cleaning.

**Recommendation #4: Higher education institutions should promote programs that include students in keeping campus facilities clean.**

More than 78 percent of students responded that they believe that the cleanliness of campus facilities has an impact on their health. Eight hundred ninety-two students described how cleanliness affects their health; 681 students provided suggestions as to how campus facilities cleanliness could be improved.

**Recommendation #5: Listen to students' feedback and suggestions and initiate actions to address their concerns and suggestions.**

This national study surveyed college students ( $N=1481$ ) to determine if there is a correlation between the **Five Levels of APPA Cleanliness** and academic achievement. The findings showed that 88 percent of students reported that the lack of cleanliness becomes a distraction at APPA Level 3 (casual inattention) and Level 4 (moderate dinginess). Eighty-four percent reported that they desire APPA Level 1 (orderly spotlessness) and a Level 2 (ordinary tidiness) of cleanliness to create a good learning environment. Cleanliness ranked as the fourth most important building element to impact their personal learning. Students perceive that there is a relationship between levels of cleanliness and their ability to learn, and

students do link cleanliness with improved learning achievement. Seventy-eight percent reported that cleanliness has an impact on their health. Students provided 892 comments of how cleanliness affects their health and 681 comments on how to improve campus cleanliness. Students reported that lack of cleanliness affects allergies, spreads germs, increases bug and rodent infestations, and promotes higher stress levels.

**Recommendation # 6: Institutions of higher education need to develop levels of cleanliness that create an environment that contributes to student learning.**

Based upon the analysis of the survey data it is concluded that there is a correlation between the **Five Levels of APPA Cleanliness** and their perceived impact on student learning. It is also concluded that students do link personal health with cleanliness.

#### CONCLUSION

The APPA, ISSA, and BYU research team learned a tremendous amount from this process. The 1,573 written comments not only provided a framework for the researchers, but also provided unique information that could be used by each participating institution. APPA's seminal work on custodial staffing and levels of cleanliness is enriched by the findings and recommendations of the research team and participants.

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Institutions of higher education need to develop levels of cleanliness that create an environment that contributes to student learning.

The research could be expanded, in the future, to include such issues as maintenance staffing and grounds staffing and the subsequent impact of these areas upon students.

Facilities managers are now well armed with two distinctive approaches to staffing custodian operations at their institutions. The first approach is based on the *Custodial Staffing Guidelines* (1992, 1998) that assist managers to staff their cleaning operations based upon APPA's five levels of service, with clearly defined outcomes of staffing at each level. An organization cannot staff their operation at APPA Level 5 and expect APPA Level 1 results. The findings of this research study indicate that the levels of cleanliness do impact the ability of students to learn. There is a correlation, maybe stated in simple terms, that the cleaner the learning space the greater the probability that students perceive they will learn. What a powerful duo of

tools. Facilities managers can now clearly indicate that decreased staffing leads to decreased levels of cleanliness, and that there is a direct connection between the cleanliness of a facility and students' ability to learn. If educational institutions are to provide the best environment in which students can learn, they would be well advised to staff at a level that will provide an acceptable level of cleanliness that will contribute to student learning and health and not detract and distract from that critical goal. ☛

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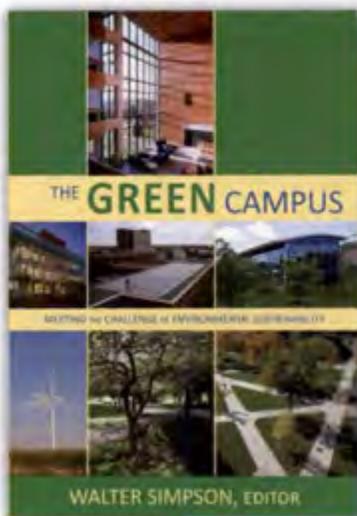
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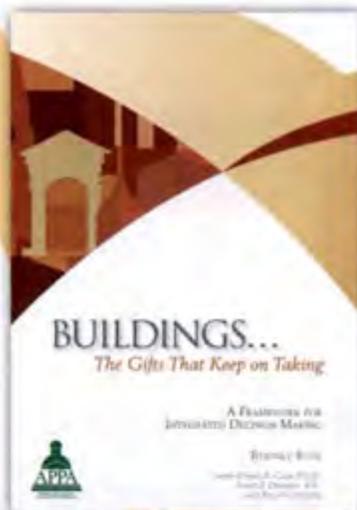
\$87 MEMBER / \$110 NONMEMBER

### THE GREEN CAMPUS

Meeting the Challenge of Environmental Sustainability

Walter Simpson, editor

*The Green Campus: Meeting the Challenge of Environmental Sustainability* explores the meaning of genuine environmental sustainability—in global and local terms—while profiling many excellent campus environmental programs. This book promises to be a vital tool that administrators, faculty, staff, students, and concerned citizens can use to help educational facilities serve a higher purpose. (A762)



\$70 MEMBER / \$95 NONMEMBER

### BUILDINGS...

#### THE GIFTS THAT KEEP ON TAKING

A Framework for Integrated Decision Making

Rodney Rose

with David A. Cain, Ph.D., James J. Dempsey, P.E., & Rich Schneider

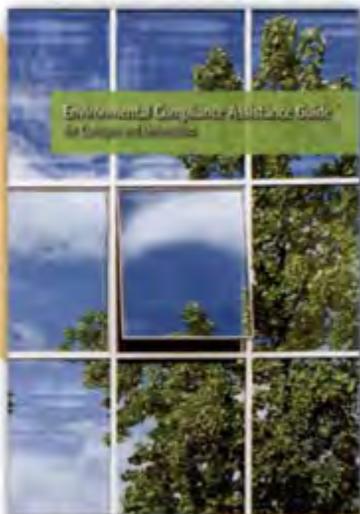
In *Buildings... The Gifts That Keep on Taking*, primary author Rodney Rose presents the oft-neglected considerations for the hidden costs and long-term management and maintenance of a facility built with donated money. *Buildings...* is a timely, must-have tool for all educational facilities managers and other top university administrators seeking a framework for evaluating facilities investment alternatives and understand the total cost of ownership of campus facilities. (A758)

## ENVIRONMENTAL COMPLIANCE ASSISTANCE GUIDE

**For Colleges and Universities, Second Edition**

*APPA & Campus Safety Health and Environmental Management Association (CSHEMA)*

This update is a comprehensive guide to assist campus facilities and safety professionals in meeting current environmental regulation requirements. The guide provides elements of an effective program for environmental management and compliance, a regulatory and campus programs matrix and legislative/regulatory program summaries. (A761)

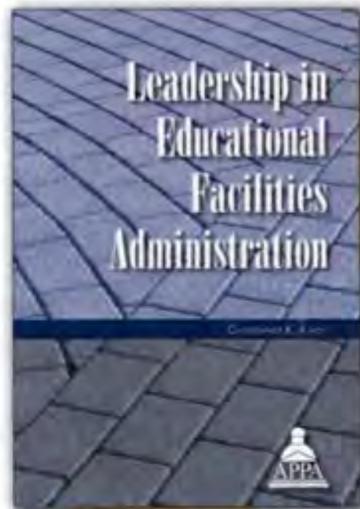


**\$66 MEMBER/\$91 NONMEMBER**

## LEADERSHIP IN EDUCATIONAL FACILITIES ADMINISTRATION

*Christopher K. Ahoy*

2006-07 APPA President Christopher Ahoy shares the wisdom he gained while leading the Iowa State University Facilities Planning and Management Department on a 12-year journey to becoming a world-class organization. *Leadership in Educational Facilities Administration* examines leadership styles, types of people in an organization, and the importance of mission and vision statements. Woven throughout the book is a detailed account of Ahoy's use of performance improvement methodologies—including Baldrige and Six Sigma—to streamline operations and satisfy customers. (A759)



**\$45 MEMBER/\$75 NONMEMBER**



### Benchmarking for Organizational Change

*Mohammad H. Qayoumi, Ph.D.*

In this book, benchmarking is defined and examined in depth. Critical factors for

benchmarking success are explored and four detailed appendices are included to help you put benchmarking into practice.

PRICE: \$45 MEMBER/\$65 NONMEMBER (A734)



### Communication is the Key

*H. Val Peterson*

A collection of 50 essays and articles from *Facilities Manager* magazine and several regional and departmental newsletters.

Author Val Peterson is a

Past APPA President who worked as a facilities professional for more than 30 years. These short pieces touch on important aspects of communication for your personal and professional life.

\$37 MEMBER/\$55 NONMEMBER (A739)



### Contract Management or Self-Operation

*Philip J. Goldstein, Daphne E. Kempner, and Sean C. Rush*

This book emphasizes the questions administrators should

ask and the analysis they should perform to determine whether self-operation, contract management, or some combination will offer the best opportunities for meeting the institution's goals and objectives. Published by APPA for the Council of Higher Education Management Associations.

PRICE: \$25 MEMBER/\$50 NONMEMBER (A681)



### Contracting for Facilities Services

Provides decision-makers with practical information on how to work with outside contractors in the facilities area. Topics include make-or-buy competitive

procurement, partnering for successful service contracting, moving from contracted to in-house operations, and case studies on painting, custodial, and grounds. The authors provide sample specs and contracts and offer real-world advice on the opportunities and pitfalls of privatization.

PRICE: \$29 MEMBER/\$35 NONMEMBER (A690)



### Creating A Service Culture

Customer service means different things to different people. On an educational campus, facilities officers deal with myriad constituent groups, including faculty,

staff, students, parents, and members of the community. This book, written by well-known experts in the educational facilities profession, offers plenty of tips and insights into making the customer connection.

PRICE: \$45 MEMBER/\$60 NONMEMBER (A752)



### Field Notes

Commentaries on Leadership and Facilities Management  
*James E. Christenson*

A collection of 25 articles on leadership, management, and the facilities profession. Topics include change management, leadership and trust, accession planning, communication, decision making, and self-assessment.

\$35 MEMBER/\$50 NONMEMBER (A751)



### A Foundation to Uphold

Harvey H. Kaiser; research report by Jerry S. Davis

This study of facilities conditions at U.S. colleges and universities reexamines the huge backlog (\$26

billion) of accumulated deferred maintenance needs at U.S. campuses. Survey results are illustrated through charts, graphs, and tables, and a list of the participating institutions included. Published as a cooperative effort by APPA, NACUBO, and Sallie Mae.

PRICE: \$21 MEMBER/\$31 NONMEMBER (A708)



### Revolutionary Strategy for the Knowledge Age

Donald M. Norris

To take advantage of the opportunities in the knowledge age, colleges and

universities must have a strategy that decisively realigns them with an emerging new economy. This book provides guidelines and ideas for reshaping higher education to achieve this goal. A follow-up to Norris' successful book, *Transforming Higher Education*.

PRICE: \$20 MEMBER/\$30 NONMEMBER (D302)



### The Strategic Assessment Model, Second Edition

This self-assessment and continuous improvement tool was revised and expanded in 2001. The authors discuss how SAM concepts and performance indicators

are organized within the Balanced Scorecard structure and how they utilize the Baldrige Quality Award criteria. Covers eight international case studies on how SAM is implemented and used as a benchmark for successful facilities management.

\$90 MEMBER/\$55 NONMEMBER (A740)

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## FACILITIES PERFORMANCE INDICATORS

APPA's Facilities Performance Indicators Survey (FPI) is an annual collection and reporting of data related to educational facilities and an integrated research information database. The FPI takes a comprehensive look at facilities operating costs, staffing levels and expenses, building and space costs and usage, strategic financial measures, and much more from colleges, universities, K-12 schools and districts, and other educational facilities.

Buy the 2006-07 Facilities Performance Indicators Report  
[www.appa.org/research/fpi](http://www.appa.org/research/fpi)

Each purchase allows your institution to identify up to 5 users who can access your report. In addition, you'll have access to nearly 400 dashboard gauges for all facilities performance indicators.

In addition, your purchase of the 2006-07 FPI report will give you access to data from the previous year (2005-06). Anyone who bought the 2005-06 report will still want to purchase again this year in order to have access to extensive data and the new Dashboard Indicators, powered by ARCHIBUS.



|                             |       |
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| NONMEMBER PARTICIPANT       | \$250 |
| NONMEMBER NON-PARTICIPANT   | \$750 |

## Thought Leaders Series Reports

2007: Educational Facilities and the Impact of Technology, Expectations, and Competition



2006: University Facilities Respond to the Changing Landscape of Higher Education

Download free PDFs at [appa.org/tools/measures/tls.cfm](http://appa.org/tools/measures/tls.cfm) or call 703-684-1446 to order printed copies.

These reports, published by APPA's Center for Facilities Research (CFaR), identify the top 10 critical issues impacting facilities for the year, and pose questions intended to encourage dialogue on campuses between educational facilities professionals and the rest of the academy. (2006: TLS1; 2007: TLS2)

## Why Buy the FPI?

- Provides secure access anytime, anywhere to the data that educational facility professionals need for continuous improvement and organizational excellence
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- Ensures focus on all aspects of operations through a balanced scorecard framework

CFaR | Center for Facilities Research

## Final Report

Impact of Facilities on the Recruitment and Retention of Students

\$29 APPA members/\$60 nonmembers.  
 Download at: [www.appa.org/bookstore](http://www.appa.org/bookstore)

In the most comprehensive study to date, authors David Cain and Gary Reynolds collected data from more than 16,000 college students from 46 institutions in the U.S. and Canada. They found a distinct, important relationship between student satisfaction, choice of institution, and the condition of facilities. (CFAR-1)



### Frugalisms

Creative Ideas on Leadership in Facilities and Housekeeping Operations

*Alan S. Bigger*

This book, published by the International Executive

Housekeepers Association (IEHA), is an anthology of 2006-07 APPA President Alan Bigger's writings as the "Frugal Housekeeper" columnist for *Executive Housekeeping Today* magazine. *Frugalisms* contains several years' worth of Bigger's housekeeping-related articles on floor care, staffing, budgeting, and customer service.

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## APPA'S GUIDELINES TRILOGY



### Custodial Staffing Guidelines for Educational Facilities, Second Edition

This guide expands on the original concepts of the five levels of clean and includes information on such specialized facilities areas as dormitories, health care facilities, and more. 33 room categories in all.

\$75 MEMBER/\$95 NONMEMBER (A727)

Did you know you can earn up to two LEED-EB points for using APPA's Custodial Guidelines?



### Operational Guidelines for Grounds Management

A comprehensive guide to maintaining and managing your grounds and landscaping operation. Chapters discuss environmental stewardship, broadcast and zone maintenance, grounds staffing guidelines, contracted services, position descriptions, benchmarking, and environmental issues & laws. Appendices list software for grounds management, sample position descriptions, extensive glossary, directory of grounds magazines, and list of professional organizations, and cooperative extension service specialists. Published by APPA, NRPA, and PGMS.

\$75 MEMBER/\$110 NONMEMBER (A738)



### Maintenance Staffing Guidelines for Educational Facilities

Contents include Maintenance of Buildings; Definitions & Assumptions; Stewardship Versus Service; Maintenance Versus Construction/Renovation/Alteration; Levels of Maintenance; Trades Descriptions; Zero-Based Staffing Buildup; and much more.

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### The Business Case For Renewable Energy

Colleges and universities are saving money and even making money with renewable energy.

They can either

build a renewable energy project on or near campus, or they can buy renewable electricity generated by others through a local utility or other supplier. This book examines both approaches and explains how and why growing numbers of higher education institutions are powered by renewable energy. It provides guidance on how to consider the various technologies, ownership options, relationships with utilities, and financial strategies.

\$30 MEMBER/\$40 NONMEMBER (A756)



### Environmental and Workplace Safety: A Guide for University, Hospital, and School Managers

James T. O'Reilly, Philip Hagan, and Peter de la Cruz

Complying with environmental and safety regulations are an important part of every manager's duties. Unfortunately, keeping up with new regulations, and understanding exactly what each means for your own organization, can be a frustrating experience. Each section includes a thorough checklist to make assessing your institution's compliance easier.

PRICE: \$30 MEMBER/\$50 NONMEMBER (A700)

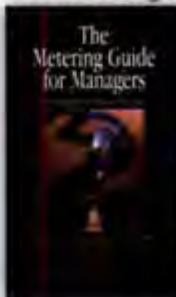


### Hazardous Materials and Solid Waste Management

To assist facilities managers in dealing with environmental and regulatory issues, this monograph covers waste

minimization, health and safety management programs, hazardous materials management at small colleges, alternative and emerging medical waste treatment technologies, and case studies from small and large institutions. \$10 (A674)

### The Metering Guide for Managers



The lack of adequate utility metering is one of the key barriers for effective energy management for many organizations.

This book provides a clear introduction to measurement and utility metering and explains

why it is important to the campus facilities professional. The book provides a discussion of basic statistics for managers, information on measurement reliability, and useful references for further reading.

\$35 MEMBER/\$55 NONMEMBER (A729)

### NEC 2008 National Electrical Code®



The world's most widely adopted safety code, this publication advances electrical safety requirements in an effort to maximize public safety, emergency preparation, and electrical worker

protection. With regulations for electrical wiring and equipment in virtually all types of buildings, this new edition responds to industry needs with expanded requirements based on research, new technologies, and recent events. A must-have for anyone involved in electrical design, installation, inspection, and safety, this edition has been updated for enhanced usability in the field, making it ideal for handling on-the-job electrical situations safely and effectively.

\$70 MEMBER/\$85 NONMEMBER (C457)



### The Building Commissioning Handbook

Second Edition

*John A. Heinz & Richard Casault*

Revised in 2004, chapters outline the

building commissioning process from pre-design to occupancy and explain the economics of commissioning and retro commissioning.

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### Campus Housing Construction and Renovation

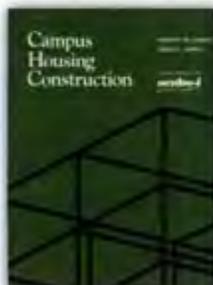
An Analysis of Cost and Design

*James C. Grimm and Norbert W. Dunkel*

Our students have changed; now our

facilities must change to meet their needs. No longer can students be packed into halls that were designed as storage units. This resource provides ideas and information to professionals involved in planning and developing student living environments.

\$35 MEMBER/\$50 NONMEMBER (F321)



### Campus Housing Construction

*Norbert W. Dunkel & James C. Grimm*

Provides information to assist college and university staff to better understand the components and processes associated

with new residential construction. The book is designed to take the reader through the steps associated with construction from concept to closing documents.

\$40 MEMBER/\$53 NONMEMBER (F320)

### Campus Planning and Facility Development: A Comprehensive Bibliography

*Edited by Ira Fink*

Fourth revised edition includes bibliographic citations for books and articles on facilities management and planning, specific campus building types, higher education history and administration, and more.

\$25 MEMBER/\$35 NONMEMBER (F310)



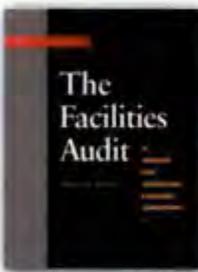
### Connecting the Dots...the Essence of Planning

*Edited by Rod Rose*

A collection of 25 articles from the SCUP journal, *Planning for Higher Education*, which includes innovative approaches to

the capital planning profession that determine the future physical character of an institution and the capability of facilities to support its programs.

\$75 MEMBER/\$85 NONMEMBER (D304)



### The Facilities Audit

A Process for Improving Facilities Conditions

*Harvey H. Kaiser*

Guides you step-by-step through all phases of your own facilities condition inspection and helps you

assess the functional performance of buildings and infrastructure, as well as help you quantify maintenance deficiencies, summarize inspection results, and present the audit findings for improved funding for capital renewal.

\$45 MEMBER/\$55 NONMEMBER (A680)

**"If you can't measure it, you can't manage it."** APPA's Facilities Management Evaluation Program (FMEP) provides institutions

with a customized evaluation conducted by a team of institutional peers. The resulting report consists of personalized feedback and recommendation. For details, visit [www.appa.org/FMEP](http://www.appa.org/FMEP) or contact Holly Judd at 703-684-1446 ext. 234 or [holly@appa.org](mailto:holly@appa.org).



**From Concept to Commissioning**

*Edited by Donald Guckert*

Written by professionals with years of architecture, engineering, building management, and commissioning expertise,

this book will help you understand and organize the entire PD&C process including pre-design planning, architect/facilities manager conflicts, building costs, timing and schedules, team building, commissioning, etc. \$42 MEMBER/\$59 NONMEMBER (A742)



**Planning & Managing the Campus Facilities Portfolio**

*Edited by William A. Daigneau*

The campus and facilities of a college should be managed

using the same principles as any other investment in an institution's financial portfolio. This book addresses the totality of managing the facilities investment of an educational institution. Published by APPA and NACUBO.

\$30 MEMBER/\$50 NONMEMBER (A747)



**Green Building: Project Planning & Cost Estimating**

This book will help you understand the various criteria for "green-ness," identify, compare, and specify green materials and

systems, learn what it takes to earn a LEED, Energy Star, or other recognized rating, and take advantage of financial incentives. Included are case studies of notable green projects.

\$85 MEMBER/\$95 NONMEMBER (M002)



**Stewardship & Accountability**

*In Campus Planning, Design & Construction*  
*Donald J. Guckert, Editor*

PDC experts offer the tools to build your reputation as an educational facilities

professional and frame your technical successes as you demonstrate your stewardship of your campus facilities. Topics include the high cost of building a better university, design decisions and the campus image, facilities masterplans, building codes, making a business case for sustainability, paying for the architect's mistakes, green building design, and design decision-making for total cost of ownership.

\$39 MEMBER/\$59 NONMEMBER (A757)



**Planning for Master Planning**

*John R. Reeve and Marian B. Smith*

Discussions of why master planning is important, the types of master planning, and the ways to implement a successful effort.

You will also learn how to prepare to do a master plan, determine objectives and who to involve, administer all aspects of the plan, and select master planning consultants.

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**Sustainability: Taking the Long View**

*Edited by Rod Rose*  
An expanded, book-length edition of SCUP's journal, *Planning for Higher Education*. Reviews all aspects of sustainability and green building design, and will help you shape policies and practices that mitigate or overcome deficiencies and impacts uncovered through assessment.

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# Helicopter Pare





# Parents Circling Colleges with Security Concerns

By Glenn R. Rosenberg

**A**re you or someone you know a helicopter parent? A helicopter parent is a person who pays extremely close attention to his or her child or children, particularly while away at college. They rush to prevent any harm from befalling them or letting them learn from their own mistakes. They are so designated because, like a helicopter, they hover closely overhead, rarely out of reach whether their children need them or not. Helicopter parents who were already circling college admissions offices with tough questions about campus safety have been in overdrive since the tragedy at Virginia Tech. Does their child's college of choice exceed their safety expectations?

All parents, whether we classify them as "helicopter" or "pedestrian," have a right to be anxious about their children's safety while at college. What questions should parents ask to ensure that the college or university the family selects is doing all they can on the safety front? What are the potential red-flags they should watch for? Campus safety is something that parents should not fear.

## Student Safety Tips for Residence Halls and at Home

- Always lock your door, even if you intend to return shortly or are just going down the hall.
- Lock all doors and windows when you are sleeping or are alone.
- Do not allow strangers to enter the premises.
- If someone asks to use your phone for emergency purposes, offer to make the call for them instead of allowing them access to your residence and possessions.
- Keep emergency numbers by your phone.
- Do not put your address anywhere that a stranger can gain easy access, such as a key chain or hang tag.
- On campus, call public safety to report any suspicious activity. Off-campus, use the emergency number of the city or town. Immediately give the dispatcher your location and any pertinent information. If possible, stay on the line until help arrives or the dispatcher terminates the call.
- Utilize a bank account instead of keeping money in your room.
- Keep ATM cards in a safe place. Never reveal your PIN number to anyone.
- Never loan your ATM card to anyone, no matter who they are.
- When possible, use your ATM card during the day. If you must use the machine at night, go to an indoor or well-lit machine.

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Parents and their children must understand the questions to ask about potential risks and take reasonable steps to eliminate opportunities to be victimized. While there is no zero-risk alternative, precautions are healthy and determining the risk profile of a school will help you determine if you're comfortable or uncomfortable with the risk balance.

**Look up Campus Crime Statistics - Security On Campus** was formed in 1987 by Connie and Howard Clery in response to the death of their daughter Jeanne, who was robbed, raped, and murdered by a student she did not know while she was sleeping in her college dorm. The doors to her dorm, which should have been locked, were propped open by fellow students. Jeanne's parents were instrumental in championing the Clery Act, a Federal law that requires colleges and universities to disclose information about campus crime and security policies.

College and university campus crime data is available from two major sources, the U.S. Department of Education which under the Jeanne Clery Act collects statistics from more than 6,000 schools, and the FBI's Uniform Crime Reporting program which includes data for about 400 schools. The most recent statistics from each government agency are available from Security on Campus's website at <http://www.securityoncampus.org/crimestats/index.html>.

Under the Family Education Rights and Privacy Act, parents have the right to know the welfare of their son and daughter at college. FERPA allows information from a student's educational records, including notification on a myriad of issues including suicide attempts, depression, underage drinking, etc., to be provided to parents of any tax-dependent student. For more information, visit <http://www.ed.gov/policy/gen/guid/fpeo/ferpa/index.html>.

**Campus Safety Audit - Security on Campus** provides a comprehensive campus safety audit. Does the residence hall have a card key system, like those used in hotels, for exterior and interior residence hall doors? Are there security patrols in residence

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halls? Are these patrols conducted by police, professional security officers or students? Visit the site and download this helpful audit and use it as an active checklist to review a school's safety. <http://www.securityoncampus.org/students/audit.pdf>

**Background Checks** – If the college contracts with a security services company, ask if the contract security firm has the ability to engage in comprehensive background screening for employment history and criminal records, and drug tests. Find out if the admissions office requires background checks on matriculated students as well.

**Task Force** – Does the college or university have a campus security task force charged with developing training to help the school prepare for, respond to and recover from emergencies? If the school has a contract security firm in place, are the security professionals leading the task force in concert with area police? Local law enforcement and first-responder agencies should participate in formulating the plans, which should be filed with the police department and reviewed annually and updated as needed. The guidelines should include protocols for intrusions, kidnapping and hostage situations. They should also provide strategies for communicating with students and staff, for responding to implied or direct threats, and for the safe evacuation of students and staff.

**Security Expertise** – While tragedy often brings out the best in people, it also brings out the worst. New security companies and consultants are popping up everywhere, many with no real world experience or expertise. Parents seeking to sort through the chaff need to ask probing questions of the admissions officials. See what the company's investment in the industry is specific to the issues encountered on a college campus (Clery Act, FERPA, alcohol abuse, etc.). Does the security company support higher education association thought leadership and do they have industry advisors who can anticipate and adjust security programs based on trends with the ability to leverage vendor relationships?

**Security Training** – It's vital that any security company engaged for campus security programs is committed to enhancing the technical skills and industry knowledge through comprehensive training programs tied to employment goals. The most important resource to any security services company is its people, and it is vital that they are continually engaged, comprehensively trained and provided with incentives to achieve and excel.

No matter which college is selected, campus crime prevention always starts with the individual student. Every student needs to be armed with the information necessary to make

safer choices each and every day. Being aware of surroundings, using assertive body language, keeping doors locked and using the buddy system will help students feel safer and may deter an attacker.

When Baby Boomers signed up for college, many of our parents had nary a worry about our physical security on campus. Today's college students are fortunate to have vigilant parents who seek to do all they can to ensure that their children make the best choices possible. 

Glenn Rosenberg is vice president of AlliedBarton Security Services Higher Education division. Rosenberg has worked in higher education for more than 30 years as a senior university administrator, management consultant, and business developer. He can be reached at [glenn.rosenberg@alliedbarton.com](mailto:glenn.rosenberg@alliedbarton.com). This is his first article for *Facilities Manager*.

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## COMMUNITY COLLEGES & APPA

Powerful Forces in Higher Education

**By Joseph Wojtysiak**

**d**uring my 40-year career in the steel industry, my perception of community colleges was that students attended basic education classes in an old, red brick building in an urban location. Like many, I neither understood nor appreciated their role in higher education. However, in October 2002, I accepted the position of director of facilities management at Harrisburg Area Community College (HACC) and my eyes have opened. Unfortunately, even today, the challenge continues—to educate the public and our political representatives concerning the important role and contribution of community colleges to higher education. It is not the continuation of high school (13<sup>th</sup> grade) nor is it a place to go when you can't get into a "real" college. There are more than 1,200 U.S. community colleges that provide an accessible, affordable, high-quality education to their communities, to their states, and to the nation. They provide the foundation for those either going on to complete their four-year degrees or to those who directly enter the workforce with newly acquired knowledge and skills.

HACC, Central Pennsylvania's Community College, was the first community college established in Pennsylvania and is currently the second largest of 14 in the commonwealth. More than 19,000 students currently attend classes at our five campuses. Curricula include Nursing and Dental, Geospatial Technology, Engineering, Computer Skills, Childcare, Theatre & Arts, Business Administration and the Alex Grass School of Business Leadership, as well as technical trades such as HVAC, Welding, Electrical, and Home Remodeling and Repair. HACC offers associate and transfer degree, certificate, and diploma programs with credits being accepted at most U.S. four-year colleges and universities.

Other major programs offered are Culinary Arts, Hospitality Management, and Travel and Tourism. There is a certified General Motors Training Center where students and mechanics can train for careers in auto mechanics. Another 40,000 students receive on- and off-site training through our Public Safety Center and through Workforce Development efforts. Nearly all firefighters, paramedics, and police officers in Central Pennsylvania are trained at our Harrisburg Campus. Through the Workforce Development department, training needs are identified in industries with HACC developing programs to address those needs.

APPA is an international organization of more than 5,200 facilities professionals representing more than 1,500 educational institutions throughout the United States, Canada, and abroad. Services provided by APPA include training in four core competency areas, supervision, and leadership. There are also extensive research, certification, and recognition opportunities. And the value of networking with other facilities professionals and receiving support from the APPA staff cannot be overlooked.

After only six weeks in my position, HACC's vice president of finance & college resources, George Franklin, to whom I directly report, had the "audacity to suggest" that I attend APPA's Institute

for Facilities Management. He had attended one of the core sessions and felt I would find value in attending. Well, after spending 32 years in management and reaching the level of plant maintenance superintendent, I balked but followed through with his recommendation. What I found out was

that you're never too old to learn.

Now having been initially introduced to APPA, and after about six months of implementing my own departmental changes, it was suggested to me that we have APPA conduct a Facilities Management Evaluation Program (FMEP) for



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our college's five locations. Yet again, I went ahead with the suggestion, and the adventure was just beginning. The FMEP both validated the changes that were being implemented and provided a roadmap for continual improvement. The vision and support provided by our vice president has allowed our Facilities Management staff to continually improve our performance to support the mission and vision of the college.

While completing the APPA Institute, and now a recent graduate from the Leadership Academy, I have met many APPA members from both community colleges and from prestigious four-year colleges. I have learned that we have many common challenges and can learn from each other by attending APPA sessions and by networking afterward. While APPA provides the tools, we must implement and use them instead of returning to business as usual.

The APPA recognition programs also provide opportunities for growth. Attending my first APPA banquet, I quickly recognized the pride that APPA members displayed when receiving their graduation certificates, and when their college and staff were recognized for having been presented with the Award

**While APPA provides the tools, we must implement and use them instead of returning to business as usual.**

submission. However, we felt that we had still won because of our continual improvement efforts in both performance and process. With the second application, we were successful.

Hopefully, there is a new appreciation for community colleges and for APPA. Recognizing their importance has been long overdue. ☺

Joe Wojtysiak is executive director of facilities management at Harrisburg Area Community College, Harrisburg, PA, which was a 2007 recipient of APPA's Award for Excellence in Facilities Management. He can be reached at [jwojtysi@hacc.edu](mailto:jwojtysi@hacc.edu).

for Excellence. Looking at the list of recipients of the award, I noticed there were no community colleges listed.

That evening I made a commitment to give back to our college for its investment of time and money, and to ultimately become the first community college to receive the AFE. This process took several years and required us to first address all recommendations identified in the report of findings from the FMEP. We failed in our first

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# Maintaining New Facilities?

By Matt Adams, P.E.

The cost to maintain a new facility has been argued between the business office and the facilities department for many years. The cliché is that new facilities don't have any breakdowns and therefore require less maintenance dollars, i.e., staff, contracts, and materials. From the plant perspective, few accept this and try to make the opposite point. However, the facts and correct answer, like those associated with so many other issues in our business, are more complicated

and sometimes hidden. What is really going on within the new facility during the first few years of operation is much more dynamic than the casual observation that there seems to be fewer unplanned failures. If you accept the cliché, then you might also accept the premise that healthy living is only required of older, sick people and that younger people don't need to bother. We all know that there are meaningful consequences for unhealthy life choices before we become aged.

Most institutions are grappling with this issue on a building-by-building basis. As a new building is added to the portfolio, the question of budget increase associated with additional maintenance load is negotiated between the business office and facilities. However, there are many institutions, both in higher education as well as K-12, where the question is given an order of magnitude more weight. This can come as a result of rapid expansion of the portfolio from new master plan fulfillment or in the case of K-12, "adequacy" initiatives or rapid population growth. In these scenarios, we ask the question of whether our maintenance budgets should increase by 10 percent if we add 10 percent or more square footage, equal to several or more new buildings – not just one. There are a number of important issues to consider, the least of them being the expected amount of unplanned maintenance for new facilities.

The facilities we are adding to our institutional portfolios are more complex than ever. The systems have new technology and require new equipment and skills for operation and maintenance. Even the contractors are struggling with these new systems, and this can result in improper installation and construction.

In all cases, commissioning is an appropriate step in the construction process. Commissioning at the end of the construction schedule is relatively brief and intense, providing considerable return on investment. In the past, there is a gap from this point for several or more years until maintenance resources are allocated or unplanned failures demand them. However, why not continue the commissioning process with a less intense, long-term approach? In other words, assemble a team of highly skilled trades to continue to test, adjust, and properly configure the operational parameters of the new systems.

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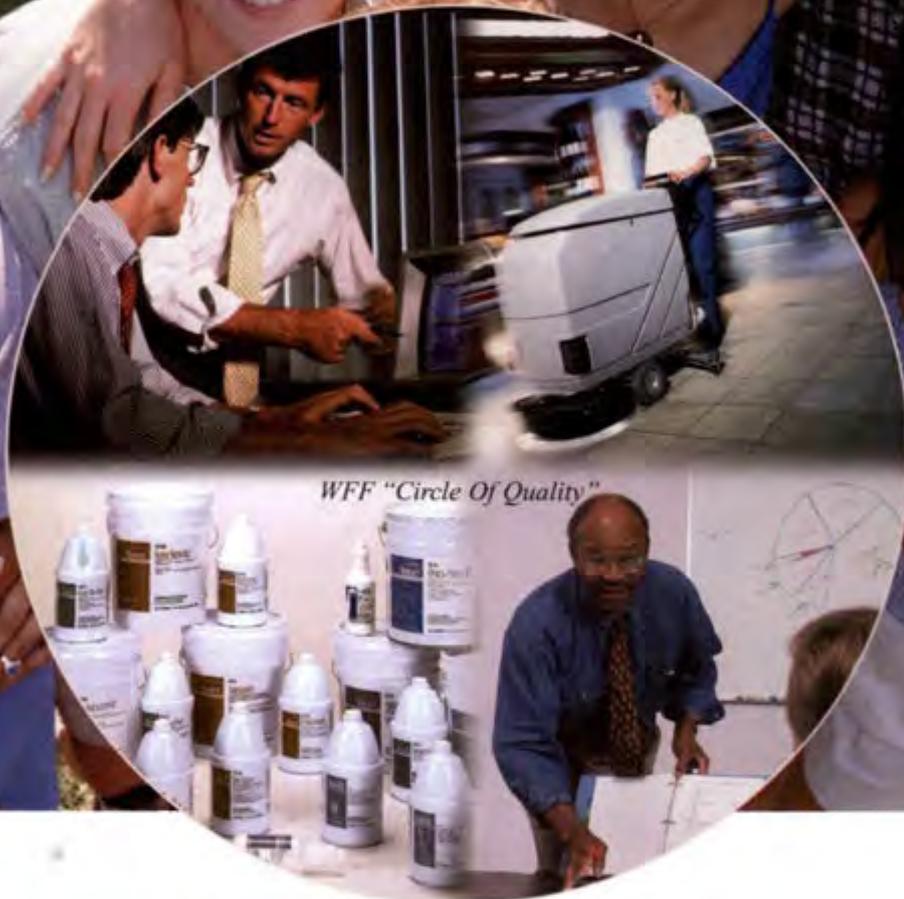
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Phil Resch, the assistant director of student housing at Stanford University, embraces the concept of "extended commissioning." He says, "There are many factors involved here—especially the fact that the buildings are alive and become even more dynamic once they become loaded/occupied, and especially student

housing facilities that are used 24/7. All new buildings are not static and all work is not covered by warranty."

Anecdotal evidence from most of our peers suggests that even with normal commissioning, the plant department must continue to fix improper installation or reconfigure systems after the contrac-

**THE TRANSFER OF KNOWLEDGE CONTINUES TO BE AN ISSUE FOR NEW FACILITY HANDOVERS. THE BRIEF TRAINING PROVIDED BY THE CONTRACTORS IS NEVER ADEQUATE AND IS OFTEN LIKE TRYING TO TAKE A SIP FROM A FIRE HYDRANT.**



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tors have left. They are actually performing a sort of "long-term" commissioning in an unplanned manner. Why not turn this reality on its head and proactively implement a long-term commissioning strategy for all new facilities? This could provide meaningful returns for up to the first five years of the life of new facilities.

The transfer of knowledge continues to be an issue for new facility handovers. The brief training provided by the contractors is never adequate and is often like trying to take a sip from a fire hydrant.

In addition to implementing long-term commissioning of new facilities, Samer Maamari, the vice president of facilities at the American University of Beirut, plans to assemble an "A-Team" of highly skilled trades and facility engineering professionals for the purpose of training the trainers. This team will immediately get immersed in all aspects of the new system technologies and become experts. By selecting the most talented staff for this task, the learning process is most robust and beneficial to the overall plant department. As more facilities and their associated new technologies are added to campus, this "A-Team" will be prepared to train subsequent teams as well as the existing plant staff. In fact, they will become technical experts offering continuous training and technical support to the remainder of the department.

In contrast, waiting five years to dedicated new staff to the same facilities

will not allow for proper training in a practiced meaningful way. Beyond the obvious train-the-trainer benefits of this strategy, external contractor costs are also avoided over time as little or none of the new high-tech maintenance work must be contracted due to lack of in-house knowledge.

From a larger perspective, early and aggressive maintenance application to new facilities is one the best and most transparent methods of turning the corner on reactive maintenance. Under the old scenario, new buildings are literally allowed to age in an accelerated fashion as a result of little or no proactive planned maintenance. Resources are applied once failures demand them. Worse yet, they are often pulled from the preexisting trade labor pool that is in full reactive mode, strapped with the older buildings in portfolio. This scenario only serves to homogenize the

## FROM A LARGER PERSPECTIVE, EARLY AND AGGRESSIVE MAINTENANCE APPLICATION TO NEW FACILITIES IS ONE THE BEST AND MOST TRANSPARENT METHODS OF TURNING THE CORNER ON REACTIVE MAINTENANCE.

performance of the buildings by reacting (repairing) to them all in the same manner.

Well-performing buildings are punished with little attention until they, too, demand resources for unplanned failures. A better strategy is to dramatically alter the deployment of maintenance resources to the new zone or group of "A" buildings on campus, and make them an example of thoughtful facility stewardship. Prove to the business office that dedicated maintenance resources—when properly deployed and given new, better standards

of care based on commonly accepted best practices—can positively impact departmental performance.

Prove the concept we all talk about but rarely demonstrate on our campuses. Use the opportunity of new facilities as a fresh start for better practices resulting in more productive, highly trained staff working on more finely tuned buildings. ①

Matt Adams is president of FM<sup>2</sup>, Atlanta, GA. He can be reached at [matt@adamsfm2.com](mailto:matt@adamsfm2.com).

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Book Review Editor: Theodore J. Weidner, Ph.D. P.E., AIA

Professional organizations publish books, manuals, and reports to assist their membership and other interested parties about issues where the organization is expected to have expertise. Below are two such examples. Both are available through the Internet, one for a fee and one for the effort of registration.

#### A UNIFIED APPROACH FOR MEASURING OFFICE SPACE: FOR USE IN FACILITY AND PROPERTY MANAGEMENT

By Building Owners and Managers Association International and International Facility Management Association, 2007, 36 pages, \$66.19 (including S&H).

In 2006 the National Center for Educational Statistics revised the



*Facilities Inventory and Classification Manual (FICM)*, the bible for measuring and classifying higher education facilities since 1974. The manual is used for reporting to several governmental organizations and to compare space use between postsecondary institutions.

This year, the Building Owners and Managers Association (BOMA) and International Facility Managers Association (IFMA) released their mutually agreed definitions for the classification and measurement of space through the *Unified Approach*. Previously, each organization had its own method for the measurement of commercial space that conflicted with the other. While it is good that these two large and influential organizations have reached agreement on the measurement and definition of spaces for their industry, there is little effect on educational facility officers.

Definitions on the measurement of space vary between FICM and BOMA/IFMA. The concept of net assignable space (FICM) is different from assignable space (BOMA/IFMA) while being similar in physical reality. Gross area differs too; BOMA/IFMA focus on gross interior area while FICM uses gross building area that extends to the outside wall surface.

Overall, the manual is of little use to educational facilities professionals except when faced with the need to rent space from/to an organization that uses the BOMA/IFMA system. The manual may be helpful when addressing questions by an institutional board member who is dissatisfied with NASF/GSF efficiencies of less than 65 percent. Otherwise, the manual should be avoided to prevent confusion with normal reporting systems.

#### ADVANCED ENERGY DESIGN GUIDE FOR K-12 SCHOOL BUILDINGS

American Society of Heating, Refrigerating, and Air-Conditioning Engineers, Inc. (ASHRAE), 172 pages, online, \$0.

The gold standard for energy efficient design is ASHRAE 90.1; it has been used by designers for over a decade and is a major reference in LEED certification. With the introduction of the *K-12 Design Guide* ASHRAE addresses a large percentage of the educational space in the United States.

The *K-12 Design Guide* starts off on the right foot with a foreword focused on school administrators and school boards. These folks, generally laypersons in the area of facilities and energy

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efficiency, are often focused on the bottom line. What better place to start talking about the total cost of ownership (an APPA initiative since the 1980s) than in a design guide.

As I studied the guide, I enjoyed the different approach taken by ASHRAE. Rather than focus on the mundane engineering aspects of good environmental design, the manual focuses on integration and location (climate zones similar to the zones that appear on seed packets in the store).

What food-price conscious consumer turned *victory gardener* can ignore that approach? Examples follow with real projects in each climate zone describing what was done and how effectively the solution worked.

After the case studies, there's a separate chapter on implementation of recommendations. Detailed discussion of commissioning, envelope, electric lighting, day lighting, exterior lighting, HVAC, water, and other methods are presented in their dry, technical detail.

So once the reader is hooked on the less technical rationale for good design, they can't help but read about the details.

While the information presented in the guide has been around for 30 or more years, with varying ability of the industry to meet the efficiency characteristics, the format helps make the efficiency argument more compelling for the non-engineer. Add to that the fact that the guide is available for free from ASHRAE ([www.ashrae.org](http://www.ashrae.org)), along with several other guides, and this makes the reading assignment well worth the investment (in this case of time). ☺

Ted Weidner is assistant vice chancellor of facilities management and planning at the University of Nebraska-Lincoln. He can be reached at [tweidner2@unlnotes.unl.edu](mailto:tweidner2@unlnotes.unl.edu).



Alice Paul Hall Vegetative Roof, Swarthmore College



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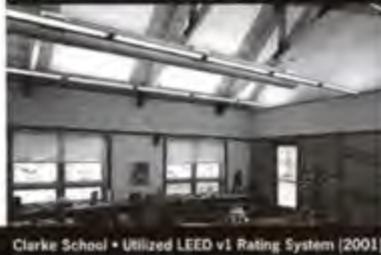
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University Sleep Products, Inc.'s Enhanced Style B™ mattresses

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## PRESIDENT'S REPORT



By Alan S. Bigger

Late last spring, the freelance writer developing an article for the *Facilities Manager* (September/October 2007) asked me what was the theme of the APPA presidency for 2007 – 2008. My response, and theme for the year, was summed up in three phrases: **Carpe diem** (Seize the day),

**renovare** (To make new), and **kaizen** (Continuous and orderly improvement). Throughout the past year, APPA members, committees, and staff have really seized the day to move APPA forward and to prepare APPA for renewal and continuous improvement.

From the front cover of the redesigned *Facilities Manager* to the home page of the APPA website ([www.appa.org](http://www.appa.org)) and from the APPA letterhead to the APPA logo, APPA has truly seized the day to position your organization as the organization of choice for all leadership in educational facilities.

The processes of the 7 Key Strategies that currently guide us were born out of a meeting after APPA 2006. The research for the seven strategies clearly identified that APPA needed to seize the day as the expectations of the membership were changing rapidly and for APPA to continue to thrive, we needed to change. APPA met the challenge and today we have a new brand identity and a new logo with a new tagline. The branding initiative has permeated every aspect of APPA life and is being rapidly picked up by several APPA regions. Not only has APPA seized the day, it is also making new. New programs abound as exemplified by the Educational Facilities Professional credentialing program, soon to be joined by the Certified Education Facilities Professional credential. Jack Colby has guided this program from conception through implementation. Well done, Jack!

Kaizen, or continuous improvement, also is thriving. The role of the Vice President of Education has morphed into the office of Vice President for Professional Development. This may seem just to be a matter of semantics, but it is far more. APPA realizes that we all need to develop from the start of our careers through the pinnacle of our careers by providing a continuum for professional development from such programs as the Supervisor's Toolkit and the APPA Institute, through the Leadership Academy to APPA's Center for Facilities Research, supplemented by such programs as

APPA 2008, the Senior Facility Officers Summit and APPA's Thought Leader series. These programs and initiatives are being provided for you because you asked for them, and we look forward to you and your staff participating in these vital programs.

A proactive example of continuous improvement in action is the redesign of the APPA Forum to the current new, energetic, and innovative format that we will experience in San Antonio, Texas in July. The very theme of the program, "The Rise to Greatness," exemplifies the hard work that the professional development and program committees have put into making APPA 2008 a hallmark conference for APPA members. We owe a huge debt of gratitude to Polly Pinney, APPA's vice president for professional development, for her guidance in the redesign and new format of APPA 2008.

**APPA has truly seized the day to position your organization as the organization of choice for all leadership in educational facilities.**

However, APPA is not only about programs, it is about members and people. Throughout the year I was blessed to visit the SRAPPA conference in Kentucky and the joint PCAPPA/RMA conference in New Mexico. There is no doubt that APPA is only as strong as its members, and the regions and members are excited about what APPA is doing as reflected in the wonderful conferences that the regions hosted this past fall. I was also able to see members in action at the Voting Assessment Task Force in Chicago, and this group has worked diligently to determine how to make the voting process meaningful and to involve more members in the process. APPA is also reaching out to its strategic partners throughout the world. In March I was able to visit Liverpool, England to speak at the Association of University Directors of Estates (AUDE) conference. My brief topic discussed "The Top 10 Critical Issues in Facilities" and was based upon APPA's 2007 Thought Leader

# 2007-2008 APPA BOARD OF DIRECTORS

Series. (You can view the 2007 Thought Leader Series at: [www.appa.org/files/pdfs/thoughtleaders2007.pdf](http://www.appa.org/files/pdfs/thoughtleaders2007.pdf).) The reception from the attendees at the conference was heartwarming, and the level of professional development seminars was world class. In May, Lander Medlin and I met with the Council of Higher Educational Management Associations (CHEMA) and shared the wonderful story of the revitalization of APPA that has been initiated by and is driven by our dynamic members.

On the APPA home front in Alexandria we have seen the renewal of the APPA staff as new members have joined the APPA team. Thanks to the great support of the APPA Executive Committee and the APPA Board, we were able to implement something that we have been working on for a long time. In January John Bernhards joined us as the new Associate Vice President for APPA. John has rapidly become a critical member of the APPA senior leadership and is guiding the ongoing operations of APPA in an effective and professional manner. Welcome aboard, John!

None of these initiative mentioned above would have been possible without the support of Chris Ahoy, our immediate past president, and Bill Elvey, president-elect and soon-to-be APPA president. Chris and Bill, without your vital and wholehearted support APPA could not have moved forward in such a dynamic manner. Likewise, Chris, Bill, and I could not have dedicated the time and efforts to our APPA tasks if it had not been for the incredible support of our wives, Ruth, Deb, and Linda. Our individual institutions are to be thanked for affording us the time to be of service to APPA. A big "thank you" to Iowa State University, the University of Texas at Dallas, and Earlham College for your support and commitment to the development of the facilities management profession. Finally, we owe an incredible debt of gratitude to Lander, John, and all the APPA staff. APPA has come a long way because of your concerted efforts and hard work.

Thank you, each one, for enabling APPA to be the organization of choice for facilities professionals while providing the best of the best in programs, education, publications, and research for all of our members as we provide leadership in educational facilities. There is much work to be done in the years ahead, and we wish Bill Elvey all the best in 2008 - 2009. The 7 Key Strategies are well under way and we need to stay the course through completion. I encourage your continued support for Bill and his initiatives during the coming year. ■

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# IMMEDIATE PAST PRESIDENT'S REPORT



By Christopher K. Ahoy

As I leave the triumvirate of APPA Presidents on July 11, 2008, in San Antonio, Texas, I can look back with gratitude and appreciation for the chance to serve as the APPA President for 2006-2007. As the 92<sup>nd</sup> APPA President since 1914, I have made many good friends locally, nationally, and internation-

ally that will carry through well past my APPA and my university's responsibilities. I leave my three-year commitment with a sense of fulfillment and pride, especially knowing that APPA is in the good hands of President Alan Bigger and incoming President Bill Elvey, and our new APPA President-Elect Polly Pinney, as well as the APPA directors and staff under the mercurial and visionary leadership of our CEO, Lander Medlin, and her new copilot, COO, John F. Bernhards, as well as her CFO, Chong-Hie Choi.

## 7 KEY STRATEGIES

- 1. Developing and executing a "branding" initiative.** This initiative, which the board approved to enlist the services of ZilYen consultants, and a select team of APPA leadership for branding, began on July 18, 2007, at the Polynesian Cultural Center, Honolulu, Hawaii, has been completed successfully. APPA launched the new logo and tagline "Leadership in Educational Facilities" in October 2007.
- 2. Developing and implementing an enhanced website to become the "go to" resource for facilities questions.** This became active on January 14, 2008.
- 3. Expanding research to build credibility and visibility by senior institutional officers.** Thought Leaders' meetings and Senior Facility Officers Summit at the annual conference, "Back to the Future," in Baltimore, Maryland, on July 11-13, 2007, did very well. The second SFO is scheduled for July 6-8, 2008, at the annual "The Rise to Greatness" Conference in San Antonio, Texas.
- 4. Engaging in symbiotic and collaborative partnerships.** In addition to the many (ACUHO-I; ASHE; AUDE; CHEMA; CSI; IDEA; ISSA; PGMS; and TEFMA) strategic alliance partnership meetings, we've added the Singapore Section, Singapore APPA (SGAPPA), and the al-

liance with Higher Education Facilities Officers (HEFMA) South Africa.

- 5. Engaging young facilities professionals.** In November 2006, at the request of BYU students, I was able to meet with the APPA student chapter and present an educational session to the facilities management student class. We need to encourage more student participation, and make it possible for them to come to the annual APPA conferences.
- 6. Providing targeted cutting-edge educational programs.** Our Professional Development Committee began this journey in Baltimore.
- 7. Establishing credible and valued credentialing programs for individuals and institutions.** The Credentialing Board was established in January 2006. Two EFP examinations have been completed on September 15, 2007 and February 9, 2008. The CEFPA advanced level of certification is being developed.

## VOTING ASSESSMENT TASK FORCE

The task force was established in May/June 2007 to investigate reasons for the disengagement of senior leadership, to develop recommendations regarding voter apathy to reverse the trend, and to present said recommendations to the Executive Committee and Board of Directors for action on the following charge:

1. Examine fact-based, data-driven, information from existing survey/committee data and results from the Strategic Planning Session.
2. Develop strengths, weaknesses, and opportunities of the current voting program.
3. Investigate best practices of how other organizations have increased voter participation and engagement rates.
4. Develop alternatives to the current method of selecting/electing association officers.
5. Determine the impact of alternative voting programs on business partners and other stakeholders.
6. Develop concepts and recommendations for implementation of the alternative programs.

Thanks to Jim Haley from Miami University, Ohio, and his team (Leon MacLellan, Martha May, Robert E. McMains, Darrel Meyer, Joseph D. Rubertone, Elvyra San Juan, Clay Shetler, and John Wong), a "preliminary" report

of the Voting Assessment Task Force was presented at the 2008 January Board Meeting, six months ahead of schedule.

#### REGIONAL AND CHAPTER MEETINGS

After the 2007 APPA Conference in Baltimore, I had the opportunity to visit many regional conferences that I had missed going to in 2006: Eastern Region APPA (ERAPPA) in Ottawa, Canada; Rocky Mountain APPA and Pacific Coast APPA (RMA/PCAPPA), in Albuquerque, New Mexico; Central Region (CAPPA) in Fayetteville, Arkansas; and Midwest Region (MAPPA) in Grand Rapids, Michigan. Thank you to each and every member for their warm welcomes to me at their chapters, regions, meetings, venues, and the opportunity to share our mutual journey to the next level of excellence in making APPA the Association of Choice.

#### INTERNATIONAL MEETINGS

Ruth and I were able to represent APPA internationally in 2005, 2006, and 2007. APPA established a Memorandum of Understanding with APPA Singapore Section, and with HEFMA, Higher Education Facilities Management Association, South Africa.

I was fortunate to be asked and be able to complete a book for APPA, *Leadership in Educational Facilities Administration*, during my presidency. Thank you APPA members,

Board members, Regional Representatives, Regional and Chapter leadership, international colleagues, and APPA staff for your friendship, support, and for giving me the opportunity to lead APPA toward our vision, "To Become Global Partners in Learning," and our mission, "To support educational excellence with quality leadership and professional management through education, research, and recognition."

APPA has faced extraordinary challenges in the past three years, and has achieved major accomplishments through the hard work of all the dedicated volunteer leaders from each chapter and region, alongside our hardworking APPA staff. The future is very promising and exciting for the APPA organization as the educational landscape is changing, and new generations of facilities leadership are moving up the ranks in these tumultuous times with globalization. We have made significant strides and investment in the future. With every new challenge there will be new opportunities for us to build a stronger, more prosperous and dedicated international, national, and global APPA community.

I thank my colleagues in "APPA land" for your friendship and support. I especially thank my wife Ruth, Iowa State University for allowing me the time to serve, and specifically my FP&M staff at ISU for filling in for me during my absences from the office. Thank you all for all you do! ■

## PRESIDENT-ELECT'S REPORT

By William M. Elvey



The past year as President-Elect has been a busy one. So busy, in fact, that my head is still spinning. Last fall I had the opportunity to visit our international counterparts in Singapore, New Zealand, and Australia. The trip concluded by attending the 2007 Tertiary Education Facilities Management Association (TEFMA) conference in Canberra, Australia, September 23 – 26, 2008. This was a wonderful experience that I will always remember and appreciate. I participated in the APPA Executive Committee meeting the following month, the APPA Winter Board meeting in January 2008, and another

Executive Committee meeting in May 2008. During March 2008 I attended both the CAPPA Technical Conference in San Antonio, Texas and represent APPA at the Florida APPA (FLAPPA) Annual Meeting in Jacksonville. I have also been fully engaged in countless conference calls involving the Regional Presidents, the VP for Professional Development and her committee, the Voting Assessment Task Force, the President and Immediate Past President, and Lander Medlin and other members of the APPA staff.

This past year has been transitional in preparation for next year as President. I want to thank Chris Ahoy and Alan Bigger for their unselfish assistance in helping me prepare for this event. I will always be indebted to them for their candidness and friendship that has been kindled during this journey.

While there have been many successes this past year,

three accomplishments are worthy of special commentary. The first includes the completion of planning efforts associated with APPA's branding (re-branding) initiative. The second is APPA completely revamping its website from top to bottom. It is definitely more inviting, dynamic, and interesting than ever. The third is this year's APPA 2008 in San Antonio. This will be a first-class event that has been designed from the ground up to address APPA members' professional development needs. However, while we have made tremendous progress on the above three Key Strategies, the APPA Board agrees that more emphasis is needed on the strategies of Engaging Young Facilities Professionals, and Expanding Research to Build Credibility and Visibility by Senior Institutional Officers.

#### APPA 2008 - 2009 - THE YEAR OF ENAGAGEMENT

According to Roget's International Thesaurus, the word Association, when used as a noun, refers to a "society, body, alliance, coalition, league, union, partnership, and federation." It also defines an Association as "community, commonwealth, family" and "fellowship, society, brotherhood, fraternity, sisterhood, sorority, and club." And when used as a verb the word Association implies: "join, join up, enter, go into, make one part of, swell the ranks of; enlist, enroll, sign up, and belong." So, when it comes to APPA as being the association of choice for educational facilities professionals, do you think of APPA in terms of being a noun or a verb?

Historically, APPA's financial position has been a great source of strength and pride and this continues to be the case today. Because of our many ongoing commitments, I cannot in good faith bring forth a new program or initiative that would only serve to undermine the sound fiscal management practices currently in place. I am, therefore, issuing this challenge to all of APPA's member institutions, primary representatives who currently hold special responsibilities in the association, and to all members - Associate, Affiliate, and Business Partners alike - to become engaged in APPA as an Association and engage others in our profession by actively spreading the word about the benefits of belonging and participation in an organization dedicated to the successful educational facilities professional.

The Year of Engagement means that as a member of APPA, it is our shared responsibility to inspire, motivate, persuade, and cajole, etc., our currently unengaged members and potential future members to become engaged in APPA at any level as there are many opportunities to do

so. In other words, if there is any expectation of getting a return on the investment of the time and resources expended in belonging to APPA, then we must ask others to get informed and stay informed and get involved and stay involved in APPA.

The sooner that one gets informed about APPA and all that it offers the educational facilities professional, the more one will seek to also stay informed. This is because APPA offers a vast array of educational and networking opportunities from the first-line supervisor to the senior facilities officer. And, whether one should decide to get involved at the local, state, regional, or international level, once one does get involved, they will want to stay involved as they realize the benefits of doing so. The opportunities to contribute to our profession are unlimited, but the choice of when and how to contribute are ours alone to make.

So, it's really up to all of us - are we going to actively participate and engage in the activities of APPA or not? Only through the collective engagement of every member at every level of the organization can we seek to transform APPA into the Association that we all want it to be: an Association serving its members the way they want to be served; and, an Association helping to focus and prioritize the delivery of programs and services with a sense of urgency and attention to detail that can surely only lead to a successful and great Association for many years to come.

Shortly after I was elected President-Elect of APPA, I was asked by Lander Medlin to start thinking about my "legacy" as President. I don't typically think about such things, but ever since that brief conversation, I have tried to do some really "deep thinking" about the subject. Then I read the book *A Leader's Legacy*, by Kouzes and Posner, and I personally agree with the points they made. Their message is that the legacy you leave is the life you lead. I may never know what changes we might initiate within APPA this next year and what impact they might have. I may never know when that critical moment might come. But what I do know is that my legacy may be nothing more than just the satisfaction of knowing that I will try my very best to leave APPA a better organization than before the time that I became President. So, I strongly encourage everyone to actively participate in APPA. ■

# SECRETARY-TREASURER'S REPORT



By Nancy Hurt

APPA has completed two years of its five-year implementation of the 7 Key Strategies in an effort to position APPA as the association of choice for educational facilities professionals. To effectively achieve this, a significant outlay of resources is necessary and expected and was, therefore,

reflected in the five-year business plan.

Last fiscal year we were able to achieve an unexpected healthy surplus. However, this year we posted a deficit of \$196,464 in the operation (exclusive of the loss in long-term equity investments) as we invested heavily in the implementation of the futures-focused 7 Key Strategies. Additional revenue and expense shortfalls from the APPA 2007 conference and inaugural 2007 Senior Facility Officers (SFO) Summit contributed significantly to this deficit. Nevertheless, we continue to refocus and recalibrate both programs and their delivery to achieve a positive result and further differentiate them from regional and other associations' conferences. The Board recognizes it will take time to turn this around.

Reserves still stand at \$973,000 (excluding any equity losses or gains in long-term investments) or 75 percent of the \$1.2 million goal that represents 25 percent of the operating budget and 5 percent of the estimated replacement value of our physical assets. In addition, the APPA headquarters building was assessed for approximately \$2.3 million in February 2008 by the City of Alexandria, and the building is fully paid.

Graph 1 on page AR-8 shows the six-year history of revenues and expenses for APPA. Graph 2, also on page AR-8, shows the year's revenues and expenses by activity category. Membership expenses, totaling \$592,007, reflects the direct cost of membership department salaries; benefits; travel and outreach efforts; printing, production and mailing of promotional materials and the membership directory; and other program supplies and equipment needs. However, membership dues also support the direct cost of many APPA activities such as website and database management; research and development; and a portion of office operation and governance. Revenues and expenses are planned and monitored by staff and the APPA Board to achieve APPA's mission to support educational excel-

lence with quality leadership and professional management through education, research, and recognition.

Given market conditions, APPA's long-term equity investments have dipped reflecting a loss of \$30,909. However, it is important to keep in mind that the investment objective for this portion of the reserve is long-term capital appreciation, so fluctuations in the magnitude of returns from year to year will occur.

The APPA staff continues to do an excellent job in controlling expenses and managing the entire budget. On behalf of the membership I offer my sincere appreciation.

## MEMBERSHIP COMMITTEE

The Membership Committee continues to support the implementation of the 7 Key Strategies. This last year ZilYen Marketing worked cooperatively with APPA staff, the Board of Directors, and the Membership Committee to produce a comprehensive membership plan. The plan identifies specific targets and measures for success. Goals for 2008-09 include an increase in Institutional Membership of 2.5 percent and a 98 percent membership retention rate.

Additional accomplishments this last year include:

- Membership committee members have access to the APPA membership database, providing a new way for regions to determine current and prospective members.
- New recruitment membership and marketing materials incorporating the new APPA brand were produced and are in use.
- A focused outreach plan for new members was developed. Each APPA Board member was provided a list of prospective institutional members from their region to contact.
- There has been strong interest in establishing new chapters such as Hawai'i and Wyoming.
- Regional recruitment and retention efforts continue with a variety of successful grassroots networking techniques and personal contact. SRAPPA has seen significant growth in the number of member institutions.

Success in the membership area is not possible without the dedication and hard work of the APPA staff, regional membership representatives, and regional committees. I extend my sincerest appreciation to all who contributed to these efforts this year.

**BYLAWS COMMITTEE**

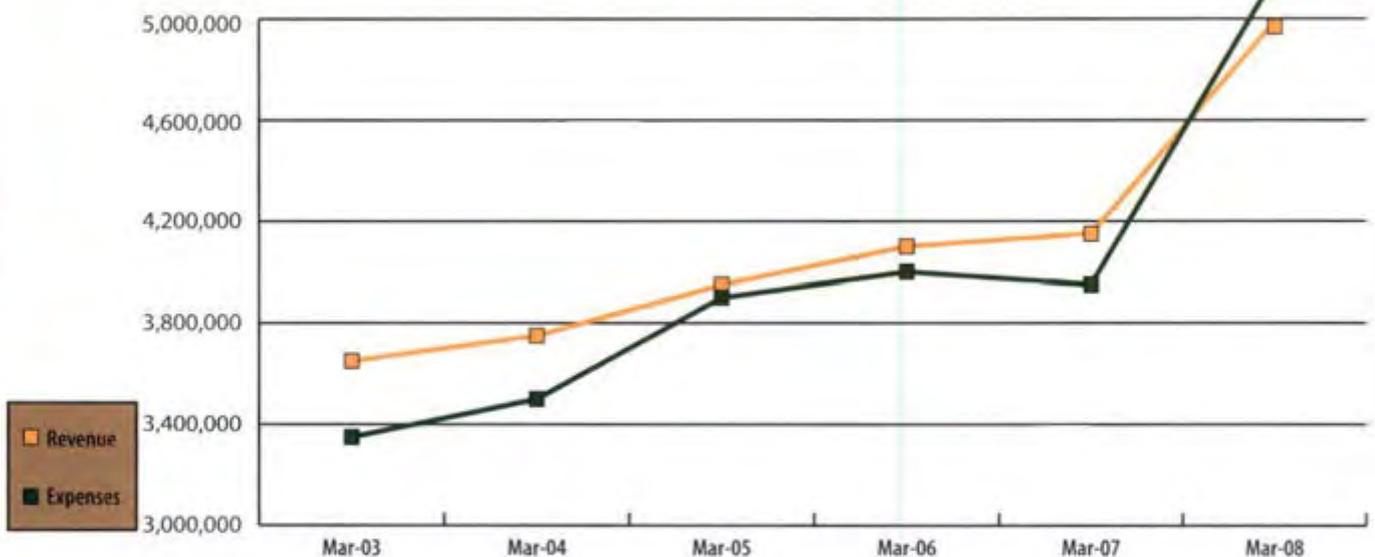
The Bylaws Committee recommended a number of bylaw changes to the APPA Board of Directors. The bylaw changes passed by the Board include:

- Change in regional definitions with the move of the State of Idaho from PCAPPA to RMA.
- Change of office and committee titles from VP for Education and Education Committee to VP for Professional Development and Professional Development Committee.

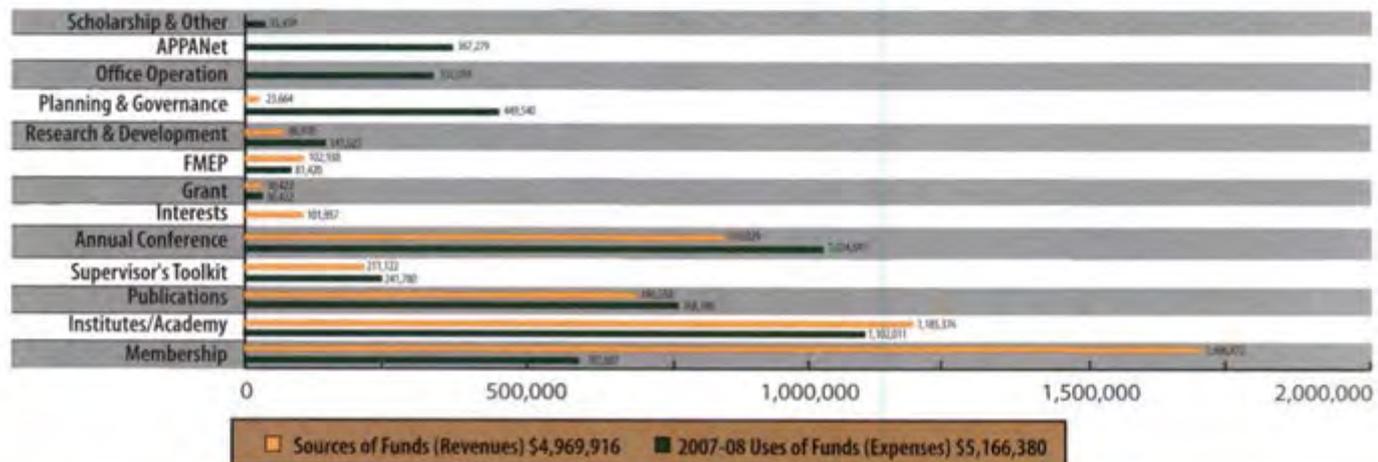
- Change of the membership category definition from "Regular Member" to "Educational Institution Member" with the corresponding move of K-12, museums, and libraries from the "Affiliate Member" category to the "Educational Institution Member."

A big thank you to all the Regional Junior Representatives; the Bylaws Committee had lively discussions and made quick work of a number of issues. ■

**GRAPH 1: APPA'S HISTORY OF REVENUE & EXPENSES**



**GRAPH 2: SOURCES OF FUNDS (REVENUES) & USES OF FUNDS (EXPENSES) FY 4/1/2007-3/31/2008**



# VICE PRESIDENT FOR INFORMATION AND RESEARCH



By Michael J. Sofield

2007-08 has been another very busy year for the Information and Research Committee. From last July's Annual Meeting through its December committee meeting, the committee worked off line and collectively via monthly conference calls to finish refining and

delivering a series of webinars to assist members in completing the Facilities Performance Indicators (FPI) survey. This year's data collection opened in August 2007 and closed in mid-December. The survey instrument was again refined in response to the many comments received in the latest survey. During the December committee meetings planning began for a second series of webinars to assist members in mining the data contained in the FPI Reports as well as to introduce the many new features included in the newest version of the reports. The second series of webinars was presented over a five-week period in late March and April following the mid-February release. This year, work also began on planning a series of workshops for the Unniversity of North Carolina System. Working with Jack Colby, APPA Past President, a team conducted a data collection workshop in the fall for three-person teams from all universities in the state system. An additional workshop was delivered in the spring on use of the reports. The materials developed under this partnership will allow it to be rolled out for additional state systems or other cohort groups. Discussions are underway with systems representatives in California and Pennsylvania as well as several informal cohort groups. This initiative holds promise to significantly increase participation in the program. Additionally, committee members delivered presentations at most of the regional meetings in the fall.

As I write this annual report the wheels are turning on the next significant revision to the FPI system. That is, the establishment of a set of 30 to 50 significant indicators, to be called 'Tier1' Indicators. These indicators are the most strategic from the over 400 in the overall system. They will be presented in a Balanced Scorecard format and will serve as the basis to integrate with our international affiliates who desire to benchmark with us.

Some 200 member institutions completed some or all of this year's survey. There has been increasing interest in the survey and reports from a number of state systems and other cohort groups. We believe that participation will increase significantly in the years ahead.

The annual FPI survey will open in August 2008 for the

2007-08 data collection cycle. And, if you completed the current survey, your data will pre-populate the screens and you need only update those areas that changed during the year. What a benefit to not have to start from scratch each year.

APPA continues to pursue an aggressive publications agenda. *Facilities Manager* magazine, published six times per year, remains a leader in our industry and has attracted a vibrant advertising base along with a wide variety of feature articles.

As this report is going to press, the I&R Committee is reviewing and rating all the eligible articles to determine this year's Rex Dillow Award winner. The award will be presented at the annual conference in San Antonio.

The magazine has been supplemented with a biweekly electronic newsletter – *Inside APPA*. This e-newsletter contains breaking news and information to keep the membership current on changes in our profession as well as providing a regular channel for news and other information. APPA staff performed miracles this year in the complete overhaul of the look, feel, and content delivery of *Inside APPA*.

Publications recently published include *The Green Campus*, edited by Walter Simpson, and *the Environmental Compliance Assistance Guide for Colleges and Universities, second edition*. Both books were released and available for the Smart and Sustainable Campuses Conference held at the University of Maryland, College Park (March 31-April 2, 2008).

## FACILITIES MANAGEMENT MANUAL REVISION (FOURTH EDITION)/BODY OF KNOWLEDGE

Work is now underway to produce a new digital edition of our benchmark guide to facilities management. Maggie Kinnaman is the editor-in-chief and has been working with the deans from the Institute and Leadership Academy to review the core body of knowledge, editors are assigned to each of the four volumes, subject matter experts have been contacted to author new chapters as well as to edit existing material. EEI Communications has been retained to manage the work processes and schedule. This is a major undertaking that involves volunteers from across APPA's committees and membership at large.

## APPA WEBSITE

Early in 2008 APPA unveiled a completely redesigned website. The new look and feel support APPA's brand identity and strategic initiatives. Work is currently underway with the Regions to assist them in integrating the APPA brand into their websites as well. Kudos to the Web Task Force and to the Information and Research Subcommittee that made it a reality.

#### CENTER FOR FACILITIES RESEARCH (CFAR)

CFaR has spent much of the past year revamping its processes as well as the comprehensive Researcher's Guide. The addition of a full-time staff research specialist has allowed the work to proceed rapidly over the past few months. All new materials will soon be available for downloading from the website. The new materials will offer streamlined processes and improved program support from APPA staff. CFaR will also be issuing an annual call for research proposals that support the 'body of knowledge' for our profession. The call will follow the annual release of the Thought Leaders monograph and it is hoped that research efforts will be linked to the emerging issues identified by the Thought Leaders Series.

This year we'll once again recognize the student research projects conducted at Brigham Young University. The student research competition process has evolved within the CFAR framework and will lead to expanded opportunities for students in the years to come.

#### FINAL NOTES

I am amazed at the results produced by this vibrant, hard-working committee that remains focused on getting the new Facilities Performance Indicator program out and into the members' hands along with so many other important tasks. The past four years have been an incredible ride for me as the Vice President for Information and Research. Congratulations and thanks to this hard-working group. Please take a moment when you see them and add your thanks to mine, for they exemplify the best of APPA. With my sincere thanks and gratitude to: Norman Young, ERAPPA; Dan Young, SRAPPA; Jeri Ripley King, MAPPA; Terry Major, CAPP; Greg Weins, RMA; Richard Storlie, PCAPPA; Maggie Kinnaman, At-Large; Darryl Boyce, At-Large; and Steve Glazner, APPA's director of knowledge management and staff liaison to the Information and Research Committee.

A special note of thanks goes Laura Long, ITL Collaborative, and to our business partner ARCHIBUS for their continued support in launching and refining, the Facilities Performance Indicators and the 'Dashboard.' ■

## VICE PRESIDENT FOR PROFESSIONAL AFFAIRS



By Kevin Folsom

**T**his has to be the easiest of the elected APPA VP positions, or the position is so well supported by excellent staff (i.e., Jill Amstutz and others), and committee members that it seems like it's the easiest. It's really amazing how all the wheels in APPA turn so smoothly while so much is going on.

Another reason the position may be so easy today is due to the giants of the past (e.g., Dan Johnson, Alan Bigger, Jack Colby, etc.) who laid such a great foundation from which I'm benefiting today. With my gratefulness, the award process this year worked flawlessly and efficiently!

This year, to everyone's surprise we had no Award for Excellence submissions, but a few institutions indicated that they are working on their's for the near future. We had nine Pacesetter Award, and one Meritorious Award, submissions.

While keeping the awards updated and running smoothly seems perpetual, there are some new initiatives that are taking shape.

**Code Advocacy** has been in development since 2004. The initiative continues to thrive thanks to the hard work and advice of Brooks Baker, Alan Bigger, Mike Anthony, and many others. Brooks had the vision to implement a program within APPA that will provide APPA members an opportunity to have a say on technical advisory panels and governing bodies that impact building codes.

The accomplishments to date are:

- Identifying 30 members and Business Partners that want to contribute
- Establishing and contributing to the Code Talkers column in *Facilities Manager* magazine
- Closely monitoring code governing bodies: NFPA/NEC, ASHRAE, ICC/IBC
- Moderately monitoring code governing bodies: ASME –

elevators & boilers, EPA, ADA, IEEE

- Indirectly monitoring code governing bodies: NERC, FERC, FEMA, TIA – tcomm, IESA
- Publishing numerous articles
- Establishing a committee of code experts from APPA membership
- Ad Hoc Code Advocacy Task Force meeting in December 2007

Code Advocacy accomplishments and needs in 2008 are:

- Received APPA board approval and funding to establish an Ad Hoc Code Advocacy Task Force for a three-year term to meet in Alexandria, Virginia in December with the other committee meetings that traditionally take place
- Investigating the provision of the National Fire Codes Universe via the Web to APPA members
- Investigate available government grants to fund self-managing codes that directly relate to educational institutions

APPA's **credentialing program** has shown significant growth since the early stages of preliminary planning in 2006. This exciting program has begun to prove how beneficial such a vehicle of validation is to the APPA membership of their knowledge and experience.

The accomplishments in 2007-08 were:

- Established a formal Certification Board
- Offered Education Facilities Professional (EFP) preparatory course in July, September, and February
- Offered first Education Facilities Professional (EFP) exam in September 2007
- 37 individuals were granted the Education Facilities Professional (EFP) credentials as a result of successful completion of the exam
- Established and have begun implementation of a tactical marketing plan

The plans for 2008-09 are as follows:

- Offering the Education Facilities Professional (EFP) Prep Course to APPA's regions and state/local chapters
- Recruiting a new program coordinator
- Establishment of the Certified Educational Facilities Professional (CEFP) body of knowledge and subsequent exam
- Recruiting efforts for additional faculty for the delivery of the Education Facilities Professional (EFP) Prep Course
- Offering Certified Education Facilities Professional (CEFP) study guide at the September 2008 Institute and first exam at the January 2009 Institute

The **APPA FMEP** Guideline will be updated in 08/09 by the FMEP committee during a formal review process.

As **ASHRAE** is in the process of developing a credentialing program, they have approached APPA for help in the area of Facilities Management and Commissioning. It is their desire not to overlap what APPA is doing with our credentialing program.

Activities are as follows:

- David Cain is serving on the ASHRAE facilities management body of knowledge committee
- Gary Reynolds is serving on the ASHRAE commissioning body of knowledge committee
- I gave a short presentation to the ASHRAE board on 1/21/08 in New York City about APPA Code Advocacy progress along with APPA's strategic initiatives
- Share speakers for one another's conferences and institutes
- Share literature between one another's membership
- Provide cross-membership discounts

The **USGBC** has accepted APPA's Custodial Staffing Guidelines as a criterion for LEED-EB certification.

Activities are as follows:

- Asking original authors to review what is necessary to update the book and make the language "a little more industry-general"
- Provided a two- to three-page interpretation of the Guide
- Identified a trainer to video on how to use the Guide

The **APPA FMEP Guideline** is due for a review, which is supposed to take place every three years. I will gather the committee, and/or fill vacant positions, to bring the committee together to perform this task during the 08/09 year.

During the 2008 Winter Board meeting, Willy Suter encouraged APPA to determine whether it is doing what is necessary in its own processes to promote environmental sustainability. I was assigned to follow up with him to learn more of his vision. Following is his report:

"I know that APPA is in the middle, or maybe even the early stages, of budget problems but if this were easy it would already be done. We need to recognize that equity/social justice and the environment are part of a complete assessment of any given situation and not just. So, as exemplars of stewardship, APPA should actively and publicly explore ways to make APPA activities as carbon neutral as possible. I am sure that some of the recommendations below are already in place, will soon be, or are in the minds of people in the APPA office. My intent here is to begin a process that will result in

APPA's carbon neutrality. We can be one of the greenest associations, but it is going to take some work. Progress and achievement can be made in a number of ways:

- Conduct a greenhouse gas inventory of APPA operations
- Aggressively conserve energy and water
- Use 100% post-consumer content recycled paper and chlorine-free inks for all printed materials
- Use of electronic means for sharing information whenever possible
- Purchase carbon offsets for all APPA travel
- Purchase renewable energy certificates to off set further the energy consumed by APPA routine operations
- Recognize an existing method (no need to create a new one) for institutions to measure the sustainability of their operations and promote it to APPA members (AASHE is developing a good one)

- Make sustainability a well understood and often used term to describe the new normal way of being

All I want to do is make the world a better and more survivable place. I see this as, to borrow Al Gore's wording, the moral imperative of our time and we have to do more than do the right thing ourselves—we have to convince everyone we know to also do the right thing.

There are robust commodity and service markets for much of the above, and once I hire my Manager of Sustainability Programs I will have someone to chase things down. I appreciate your getting back to me on this. I'd like to see language about the types of things mentioned above on APPA's website, the *Facilities Manager* magazine, and everywhere else with potential to inspire action." ■

## VICE PRESIDENT FOR PROFESSIONAL DEVELOPMENT



By Polly Pinney

The Professional Development Committee, the deans, faculty and trainers of our Supervisor's Toolkit, Institute for Facilities Management and Leadership Academy, along with the APPA 200X and SFO Summit Subcommittees have worked hard to improve and enhance the educational offerings of this splendid organization. Without their creativity, talent, and extraordinary dedication, our work could not go forward.

During the past year we renamed the Educational Programs Committee the Professional Development Committee. This change was driven by a desire to more closely reflect our philosophy of educational programming as a continuum throughout one's entire career. In addition, a revised evaluation process was developed to ensure coordinated feedback and metrics on our programming. The Professional Development Committee continues to expand on their revised committee charge and

furtherr engage our regional colleagues in collaboration. My thanks to the Professional Development Committee Members - Vickie Younger, Michelle Frederick, Ruthann Manlet, Johnny Eaddy, Shawna Rowley, Tony Yamada, Wally Glasscock, Jay Klingel, Doug Christensen, David Gray, and Terry Ruprecht for all their hard work and continued dedication.

**SUPERVISOR'S TOOLKIT: NUTS & BOLTS OF FACILITIES SUPERVISION**

### SUPERVISOR'S TOOLKIT: NUTS & BOLTS OF FACILITIES SUPERVISION

APPA's first step in the professional development continuum, Supervisor's Toolkit, continues to experience a surge in popularity throughout the United States and Canada. The Master Trainers have released the newly revised material streamlining some of the work to allow for more interaction and hands on learning. This program is unlike anything else in the professional development arena and really is the best value out there to take our frontline supervisory teams to new heights of excellence. Many of our regions are moving toward supporting the development of state-based trainers. For example, SRAPPA has committed to support training

for 12 individuals as of 2008 in order to have state based trainers. The kick off training for this group of potential trainers was recently completed in Daytona Beach, Florida, which was hosted by Embry Riddle University. By all reports this session was a great success. My thanks to the Master Trainers - Michelle Frederick, Wally Glasscock, Carol Trexler, and Nancy Yeroshefsky—for all their hard work and continued dedication to this important offering.

#### **INSTITUTE FOR FACILITIES MANAGEMENT**

As APPA's premier educational offering, the Institute continues to provide a solid professional development tool to the membership. Our most recent program, held in Newport Beach, California in February was marked by sold-out and record high attendance of 548. The Institute continues to welcome nearly 1,000 participants annually for top-notch training in the facilities profession. Thank you to the faculty who gave of their time, talent, and valuable skills for each Institute. My thanks to the Deans - Jay Klingel, Mary Vosevich, Lynne Finn, and Don Guckert—for all their hard work and continued dedication.

#### **LEADERSHIP ACADEMY**

April 2008 marked another sold-out offering of the Academy in Scottsdale, Arizona, with nearly 150 professionals from across the United States, Canada, and England. The energy and commitment of the participants was positively palpable at the graduation ceremonies, and I know that these individuals carry this home to their institutions with a renewed commitment to excellence. Academy Deans are currently working to establish additional faculty as well as back up faculty to ensure continuity of the program. Additionally, the Deans of Track 4 are launching their revamped content which really engages the individual in striving for the optimum organizational structure. My thanks to the Deans—Doug Christensen, Glenn Smith, Ann Jenkins, James Cole, David Judge, Bill Daigneau, Maggie Kinnaman, Tom Stepnowski, and Jack Hug—for all their hard work and continued dedication.

#### **APPA 2008**

As I am sure you are aware our new format change for APPA 2007 yielded a very successful event, and APPA 2008: The Rise to Greatness is gearing up to be just as successful. APPA 2008 will help us climb toward peak performance by offering sessions to challenge, motivate, and transform you and your facilities operations. Programming that has been designed by facilities professionals for facilities professionals will focus on

Leadership & Collaboration, Solution Revolution & Technology and Connection & Communication. Headliners are Dr. John Maxwell, Marcus Buckingham, James Kouzes, Don Tapscott, and Stephen M.R. Covey. Each day will give you multiple perspectives to help you establish a steady grip on your rise to greatness. The enhanced framework will again consist of daily opening plenary and general sessions, followed by panel sessions and breakout sessions designed to provide practical tools to use on current and future projects on your campus. We have added a Companion program and are also working with a local committee and the visitors bureau to enhance local knowledge and communication. Work on APPA 2009 has already begun! My thanks to the Planning Subcommittee—David Gray, Vickie Younger, Marion Bracy, Anita Bailey, Mark Valenti, Matt Adams, Fred Plant, Ruthann Manlet, and Ben Elisondo—for all their hard work and continued dedication.

#### **SFO SUMMIT**

Coming off their inaugural offering of SFO Summit 2007, the programming committee considered lessons learned and created a format for 2008 that is a "must attend" for senior facilities officers. We continue to be encouraged that this invitation-only event will address the needs of this facet of APPA's membership and provide an arena to network with colleagues and determine the future of facilities on their campuses. My thanks to the Planning Subcommittee - Terry Ruprecht, Frank Brewer, Kevin Folsom, Brooks Baker, Steve Kraal, Fred Plant, and Curtis Reynolds—for all their hard work and continued dedication.

#### **FINAL NOTES**

All of these activities would be impossible without the incredible support of the APPA staff, most notably Suzanne Healy, director of professional development. She, and each member of APPA's staff, takes multitasking to new levels. Their talent and dedication are truly awesome to witness and I am indebted to them.

Lastly, thank you for the opportunity to serve this organization and the membership as Vice President for Professional Development. The last two years have been an honor and a privilege. The experience of working with so many dedicated, creative individuals has been extraordinarily rewarding. Your new Vice President, David Gray, and I are already working to ensure a smooth transition. David will be a wonderful addition to the APPA leadership team and I look forward to working together. There are experiences in life that we remember as highlights. This will truly be one of mine! ■

# EXECUTIVE VICE PRESIDENT'S REPORT



By E. Lander Medlin

Indeed these are uncertain economic times for education – locally, nationally, and globally. Although public perception of the value of a college education remains strong, the energy crisis is eclipsing all other factors contributing more significantly than

ever to the funding challenges we all face.

APPA is no different. Yes, APPA's membership participation in educational programs and engagement in the work of the improving the profession remains high and productive. And, our diverse portfolio of programs, products, and services continues to serve us well. Nonetheless, we must report a year-end deficit of \$196,424. By large measure this deficit is a reflection of our continued commitment to the investment in our 7 Key Strategies. Unfortunately, we could not mitigate the revenue and expense shortfalls from the APPA 2007 conference and inaugural Senior Facility Officers (SFO) Summit. We are moving in a more positive direction this year and will continue our efforts vociferously. In addition, cash outlays for the development and execution of the certification program are significant, however, we are already beginning to see a return on the investment. The good news is our operating reserves fund of \$973,000 remains intact representing over 75 percent of our long-term, Board-directed cash reserves goal. And, most categories of our budget achieved or exceeded the budgeted targets set by the Board for revenue generation and expense minimization. In addition, we own our headquarters building outright valued at \$2.3 million. As such, APPA remains the "association of choice" serving educational facilities professionals with a myriad of professional development and leadership growth opportunities that are positioning us for the future.

Under the excellent leadership of President Alan Bigger, we have completed the second year of our five-year strategic plan to effectively implement the 7 Key Strategies.

As we complete various aspects of the 7 Key Strategies, the clarity of focus and direction is sharpened and crystalized in ways that increase value to our members in both tangible and intangible ways. Our programs, products, and services have transformed into a professional development career continuum that is unparalleled in the industry. Our role to transform educational facilities professionals into influential leaders in education is taking shape. Further, implementation and execution of these 7 Key Strategies

is critical to delivering the desired outcomes of competency, collaboration, and credibility for our members. This remains a consistent key message and laudable goal for the association. Our continued work on each of the 7 Key Strategies is reflected throughout each of these three Cs.

## COMPETENCY

The guidelines and standards established by your colleagues over the past several years remain invaluable tools for resource allocation and strategic planning. If your resource library does not include the web-based 2006-07 *Facilities Performance Indicators* (FPI) and dashboards and our newest books *The Green Campus* and the significantly revised edition of the *Environmental Compliance Assistance Guide* (published in collaboration with the Campus Safety Health and Environmental Management Association (CSHEMA) along with *Buildings. . . The Gifts That Keep On Taking: A Framework for Integrated Decision-Making and Leadership in Educational Facilities Administration, Making the Case for Renewable Energy* (published in collaboration with NACUBO and SCUP), and *Stewardship & Accountability in Campus Planning, Design & Construction*, you should quickly ensure that it does.

The availability and flow of relevant information regularly occurs via APPA's bimonthly magazine, *Facilities Manager; Inside APPA*, our biweekly electronic newsletter; our website, [www.appa.org](http://www.appa.org); and the APPAinfo discussion list that boasts over 1,000 subscribers. In mid-January, we relaunched the APPA website to represent our updated, transformational brand identity. The site is indeed becoming the "go to" resource for educational facilities questions.

CFaR, APPA's Center for Facilities Research, is also resident on our website and fills a vital need by integrating the development, collection, and delivery of research in the education environment. Active participation in and involvement through CFaR by facilities professionals, allied associations and agencies, and other education community stakeholders is increasing the quality and quantity of credible data and information you need to make knowledgeable and informed decisions for your institutions.

Over a dozen research projects have been completed to date. Completion of APPA's two major sponsored research projects: *Buildings. . . The Gifts That Keep On Taking: A Framework for Integrated Decision Making*, which demonstrates the importance of integrated resource planning and management for both capital development and renewal/maintenance of all facilities, and *The Impact of Facilities on*

*Student Recruitment and Retention* both significantly contribute to the body of knowledge for the facilities profession and ultimately impact decision making by education's senior institutional officers. Please make sure you get more detailed information from APPA's website on these two projects.

Finally, as part of our strategy to expand research, APPA, through the gracious sponsorship of Jacobs Carter Burgess, delivered its third annual Thought Leaders Symposium in April 2008. In essence, a group of key higher education stakeholders consisting of chancellors, presidents, regents, business officers, facilities professionals, and representatives from the business community are assembled annually and engage in a day-long discussion of several drivers of change expected to shape the future of higher education and their impact on facilities. The specific trends in higher education and the top ten critical facilities issues for fiscal years 2006 and 2007 are published as monographs and have been disseminated to facilities professionals and senior institutional officers. The third Thought Leaders Symposium focused on the criticality of workforce demographics and accountability in higher education, and the impact of institutional resistance to change on both these major trends.

I am also pleased to report that APPA (through the generous sponsorship of Affiliated Engineering, Inc.) launched a second Thought Leaders workshop focused on delivering a "Practical Implementation Guide for Reducing the Campus Carbon Footprint." We plan to deliver this monograph to the community later this coming fall.

It is just this type of research that will brand APPA as the "go to" resource for educational facilities questions. And, it is through these research findings and thought-provoking symposia that we will increase the awareness of the facilities profession with senior institutional officers and enhance the credibility of the educational facilities professional.

The content and appeal of APPA's vast array of educational programs (Institute for Facilities Management, Leadership Academy, and the Supervisor's Toolkit) provide members with the professional and personal growth and development needed to compete and collaborate effectively in today's environment. These educational programs are truly cutting-edge. And, to meet your continuing education/ licensure requirements, look for the CEUs and PDHs available for many of the courses offered at these educational programs.

Of particular note is the complete reformulation of APPA's annual conference (now simply called "APPA 200X"). We have featured best-of-breed speakers who will focus on the future

solutions to our most pressing issues. The enhanced framework consists of a daily opening plenary session, followed by panel discussions and breakout sessions designed to provide practical tools and technologies for current and future projects, to bolster your skills, and to prepare your organization for the next generation of facilities management practices. This approach strengthens this offering in a number of ways and ensures differentiation from regional and state or chapter meetings. Also, we will again deliver a distinct program strictly for senior facilities officers called the Senior Facility Officers Summit within the same venue. These two educational programs will serve the continuing professional development needs of mid-level managers, directors and senior facilities officers. These activities are considered essential by the volunteer leadership to provide for a continuum of professional development opportunities for the educational facilities professional.

To add to this continuum of professional development opportunities and to complement our competency-based programs and services, APPA's Board of Directors approved the development and execution of a certification program comprising two credentials. The first credential is a knowledge-based credential called the EFP (Educational Facilities Professional) targeted to the *younger*, less experienced educational facilities professional. A preparatory course has been delivered numerous times this year and in conjunction with our major educational offerings. In fact, the first exam for the EFP occurred September 14, 2007 in Phoenix, Arizona following the Institute for Facilities Management. As a result, several dozen individuals have now achieved the status of EFP. The second credential will be a full certification for the more *experienced* educational facilities professional (CEFP – Certified Educational Facilities Professional) incorporating both the body of knowledge of educational facilities management and successful demonstration that knowledge has been applied at the institutional level. The CEFP designation will launch this fall and the first exam will be available in January 2009 at the Institute for Facilities Management. Both these credentials are essential for the future engagement of our young facilities professionals in APPA and the educational workplace and to increase the credibility of the facilities profession at educational institutions.

#### COLLABORATION

Strategic collaboration and partnering continues to occur on a number of fronts and increases the depth and breadth of research and information and ultimately the value you

receive as part of your membership. APPA's latest work with NACUBO, SCUP, and the EPA through the Smart & Sustainable Campuses Conference and HEASC (Higher Education Associations Sustainability Consortium) are expanding the collective knowledge and network for institutional sustainability programs. To this end, APPA (with significant sponsorship from AED) will be offering a pre-conference, day-long workshop in conjunction with the AASHE (American Association for Sustainability in Higher Education) conference in Raleigh, North Carolina, in November 2008.

The joint ACUHO-I/APPA Facilities Conference remains a very successful program offering for both the campus housing and facilities professional. This program is offered annually each fall.

These strategic alliances and partnerships help APPA leverage its resources to provide cost-effective, focused research, information, and educational programming, and at the same time, ensure an increased information flow to our members and provide opportunities for more meaningful engagement by young facilities professionals. Visit our website for more details about our combined offerings to take advantage of these relationships.

#### CREDIBILITY

Environmental issues and compliance concerns remain an important part of our public policy agenda. APPA is one of six organizational members of the EPA College & University Sector Initiative that is focused on reforming the hazardous materials regulations and establishing better environmental performance measures and systems. This alliance consists of the ACE (American Council on Education), NACUBO, CSHEMA (Campus Safety Health and Environmental Management Association), HHMI (Howard Hughes Medical Institute), and C2E2 (Campus Consortium for Environmental Excellence) and continues to drive our efforts to create and maintain a substantive dialogue with the EPA. Visit our website for updates on progress and utilize the associated web-based education compliance assistance center for your information needs ([www.educationcompliance.org](http://www.educationcompliance.org)).

The explosion of regulatory issues and code compliance has driven the establishment of a Code Advocacy Task Force by the APPA Board. The task force is presently aligned under the duties and responsibilities of the Vice President for Professional Affairs. Look for more information on these important developments during the coming year on the APPA website.

The clarity of APPA's brand purpose "to transform the educational facilities professional into influential leaders creating supportive and inviting learning environments" is integral to all we do. And, APPA's role in increasing the awareness of the facilities profession with senior institutional officers will remain a strategic driving force on behalf of the education facilities profession. Our brand identity in education is reflective of this purpose and role and its on-going attainment. Our commitment to programs, products, and services that improve the facilities professional's competency remains unparalleled in the field of educational facilities. By coupling this increased competency with our collaborative strengths, the credibility of our members and the profession is further enhanced.

APPAs competitive advantage in this rapidly changing and challenging world stems from your active engagement across our professional development career continuum where you will find programs, products, and services of great value as you wisely choose membership in this association. The decisions you face and the priorities you make must be strategic. We are pleased to be part of your strategy for your individual professional development, the training and development of your organization's staff, and for continuous institutional improvement.

We appreciate the value you place on your membership in APPA and in our professional development programs, targeted publications, and meaningful recognition and awards programs. Our efforts to focus on the grassroots of this organization will continue in the coming year to ensure that your needs and expectations are being heard and ultimately met. In addition, we will remain diligent in our efforts to fully implement the 7 Key Strategies considered essential to the focus and direction of the profession and the association well into the future.

Through the vast array of educational offerings, print and electronic information, research, and publications, and this rich network of professionals, APPA can help you gain that competitive edge and enhance your professional image.

Certainly, the continued challenges we face as an association, as educational facilities professionals, and as an industry sector will require our best collective and collaborative efforts. Your contributions will be key in helping to shape the future of education. APPA's contributions will be key as a significant voice on strategic institutional issues for the educational facilities profession. ■

# 2009

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