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JAN/FEB 2010

CAPITAL RENEWAL

INSIDE

Deferred Capital Renewal as a Spoiler

State of Mississippi Does the FMEP

The Y Generation

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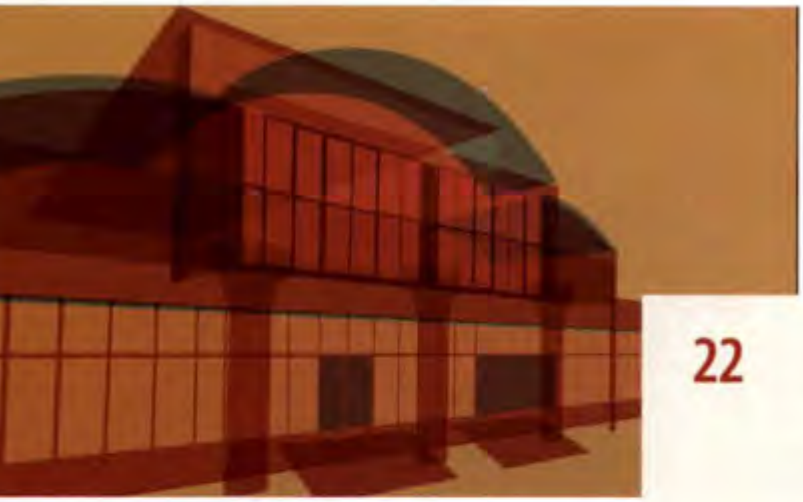
features

JANUARY/FEBRUARY 2010
VOLUME 26 • Number 1



CAPITAL RENEWAL

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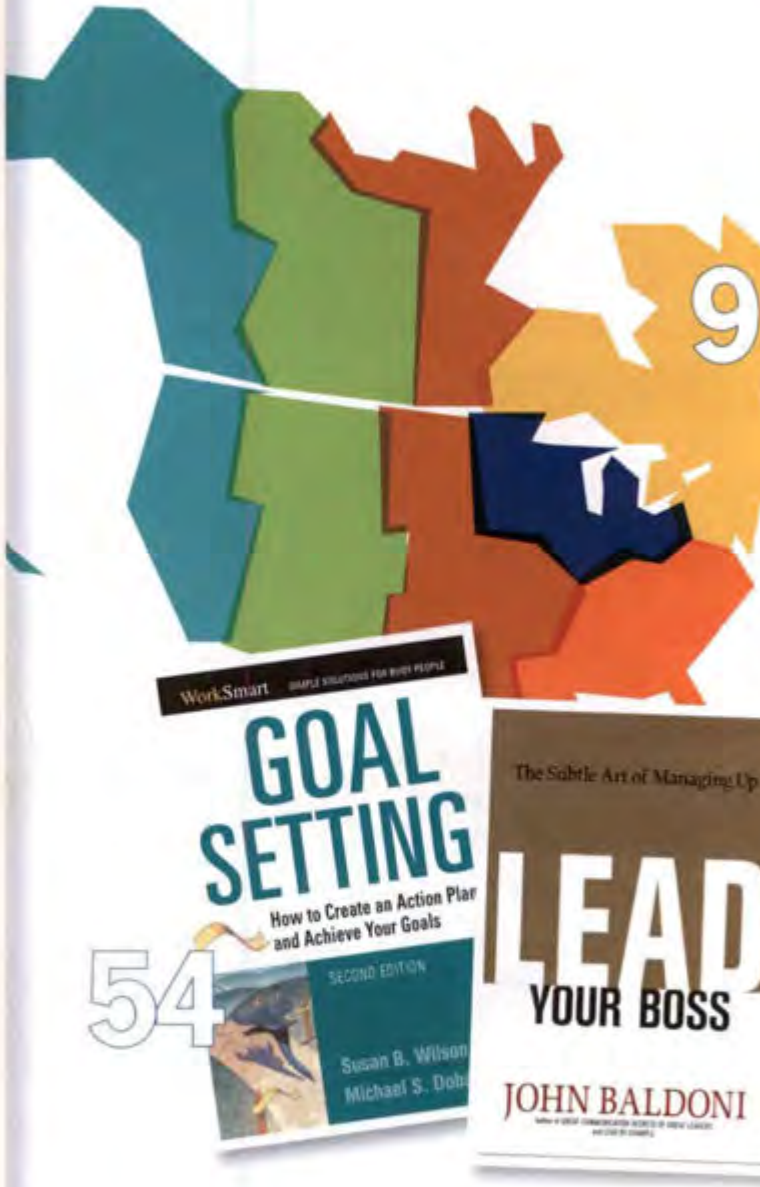

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As the new year begins in the midst of a continuing economic recession, our colleges, universities, schools, and districts are wrestling with the realities of reduced funding, limited human resources, and greater pressure to perform well within those restrictions. Reduced endowments, skyrocketing enrollments, and slashed state funding also contribute to this milieu.

These very attributes, however, contribute to an environment in which our educational facilities professionals work to be innovative and creatively solutions-oriented in their support of the institution's goals, mission, and current requirements. The practical, problem-solving abilities within facilities management will help guide our schools into the next successful chapter of educational growth and purpose.

This issue of *Facilities Manager* takes a look at one important area in which we need to be active participants—capital investment in the built environment. What will that mean in the new decade? How best do we invest in our infrastructure and our new and continuing programs? What decisions will we have to make?

We are pleased to provide in this issue a short excerpt from a new APPA book, *Strategic Capital Development: The New Model for Campus Investment.* Written by blue-ribbon authors Harvey H. Kaiser and Eva Klein, this new book lays a solid foundation for the context and potential solutions for strategic and appropriate campus investments in facilities. Sample models and indepth case studies are included, and the book is extensively illustrated.

Also in this issue, Joe Whitefield provides a serious and timely discussion of capital renewal and deferred maintenance, and how they can become a "spoiler" for more high-visibility campus programs. The perception, and unfortunate resulting reality, of funding for capital renewal takes away from the "priority" issues on campus. Joe presents a valuable perspective on maintaining all the priorities for the institution's well-being.

Commitment to its facilities as supporting resources is tremendously illustrated by the State of Mississippi in the recent completion of an assessment of the facilities operation at all eight universities in the system. APPA Fellow Jack Hug served as the team leader for the entire project, conducted through APPA's Facilities Management Evaluation Program, and he shares the process and outcomes in this issue. We urge other systems to consider adopting the same evaluation concept for its own institutions; the benefits are many, and APPA can work with you to customize an effective assessment program.

And we've also included an article on the topic of better understanding and working with our younger employees. Darcy Loy presents a useful guide on Generation Y and the Millennials, which, when it comes down to it, relates specifically to succession planning.

Happy New Year to all.

Coming in March/April 2010

- Energy/Utilities Theme
- Greenhouse Gas Reporting
- NFPA No-Flow

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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 5,200 educational facilities professionals at more than 1,900 learning institutions throughout the United States, Canada, and abroad. For more information, visit us at www.appa.org.

APPA 2010 Conference and Exposition

BOSTON

APPA 2010 Conference and Exposition

MASSACHUSETTS | JULY 14–16, 2010

APPA's premier annual conference, APPA 2010, will focus on several key issues we face. We will not only explore these important topics in detail, but the collaboration and interaction with peers makes this conference an unmatched value among the critical choices we make in the year ahead to better support the educational mission we serve.

The program concepts for this year's programming will be centered on:

- *Economy*
- *Energy*
- *Safety & Security*
- *Succession Planning*
- *Sustainability*

Join us in Boston, Massachussetts this July where we will be in a city on the leading edge of public policy and planning that has taken a holistic approach to creating a sustainable city that balances and enhances the environmental, economic, and social needs of the community.

The challenges facing today's educational facilities professionals are many – and at times, daunting. Let APPA 2010 provide you with the answers:

- *Identify viable and proven solutions from today's leading management experts and from your professional peers.*
- *Execute viable, successful strategies tailored to your organization's own unique set of circumstances.*
- *Gain insight on current trends and conditions that allow you to strategically influence and lead your institution now, and well into the future.*

Developed by an eager and dedicated team of your peers and colleagues, APPA 2010 brings to you nothing less than world-class speakers, abundant networking opportunities with other facilities professionals, and answers to the most critical challenges facing you, and your educational institution, in today's facilities environment.

Visit us today and view the program offerings that you do not want to miss this July!

to register for APPA 2010 visit www.appa.org/training/appa2010.

APPA LEADERSHIP IN EDUCATIONAL FACILITIES BOSTON MASSACHUSETTS | JULY 14–16, 2010

APPA 2010 – HALL OF RESOURCES IS NOT COMPLETE WITHOUT YOU!

If you are an APPA business partner, one your most valuable benefits is the discounted booth rate you are entitled to when participating at APPA's annual meetings. Haven't reserved your booth yet? Visit us today at *www.appa.org/training/APPA2010/exhibitors* and lock in your prime location. Representatives from K-12, community colleges, and higher education institutions will be represented this year in Boston July 14-16. Don't miss out – reserve your booth today! For assistance with your reservation contact Suzanne Healy, director of professional development, at *suzanne@appa.org*.

PROFESSIONAL DEVELOPMENT

APPA's Remaining EFP Exam Dates

APPA will be hosting exam testing sites at several locations on February 5, 2010 & March 5, 2010. To see the latest site offerings where you can sit for the EFP exam, visit us at *http://certification.appa.org*. Questions about how to submit your application, contact Katy Theranger, professional development and certification manager, at *katy@appa.org*.

APPA 2010 – REGISTRATION NOW OPEN

Join your facilities colleagues for the annual industry event presented by APPA that you can't afford to miss. Visit us today at *www.appa.org/training/APPA2010* for the latest on speakers, programming offerings, and check out the business partners are supporting us this year! Remember July 14-16 Boston, Massachusetts – The Seaport Hotel – register today and book your travel early. For questions and inquiries, contact the Professional Development team at *education@appa.org*.

BOK – APPA'S BODY OF KNOWLEDGE NOW AVAILABLE!

BOK

Body of Knowledge

The BOK *[pronounced B-O-K, not Bock]* is APPA's ongoing Body of Knowledge project, and we are excited to announce that the BOK has been released digitally through the APPA website.

A body of knowledge is the collected wisdom, experience, processes, and facts that both inform a profession and provide the solid foundation from which continuous improvements and innovative change can occur. APPA's Body of Knowledge updates and builds upon the contents of *Facilities Management: A Manual for Plant Administration* — APPA's major reference book published in three editions since 1984—and makes them available in a searchable digital database.

Editor-in-chief Maggie Kinnaman is overseeing dozens of writers, editors, and peer reviewers as they revise, update, and enhance the APPA body of knowledge. The project is ongoing, and updated sections will be posted as soon as they are peer reviewed and approved.

Access to the Body of Knowledge is through an annual subscription. Member institutions of APPA pay a discounted price, and the subscription price is reduced after the first year. Your subscription allows BOK access to anyone in your organization. In addition, you will be automatically subscribed to receive *BOK Update*, a periodic e-newsletter that will include highlights and topics of focus from the BOK's editor-in-chief and content coordinators, announcements of new or revised BOK chapters, and much more.

- $199 - APPA member institutions, organizations, and business partners
- $499 - Nonmember institutions, organizations, business partners, and individuals
- To learn more and to subscribe to the BOK, please visit *www.appa.org/bok*.

PROFESSIONAL GROUNDS MANAGEMENT SOCIETY SALUTES TOP UNIVERSITY AND COLLEGE GROUNDS SITES AND TOP URBAN UNIVERSITY SITES

While Hollywood has the Emmys and athletics has the Olympics, the Green Industry has the Professional Grounds Management Society (PGMS) Green Star Awards. This program brings national recognition to grounds maintained with a high degree of excellence, complementing other national landscape award programs that recognize outstanding landscape design and construction. PGMS recently recognized several winners in the both the Urban University Grounds Category and the University and College Grounds Category.

Winners in the Urban University Grounds Category were:

- The University of Texas at Brownsville, which received a Grand Award.

Three others were recognized with an Honor Award in the same category including:

- California University of Pennsylvania
- Catholic University of America
- The University of Michigan

Winners in the University and College Grounds Category were:

- Creighton University and Southern Methodist University, which both won Grand Awards.
- Kutztown University and Western Michigan University both earned an Honor Award.

View a photo slideshow of all of the winners at *http://www.pgms.org/2009greenstar/index.htm.*

APPA'S NEW ONLINE DIRECTORY

APPA's new online directory will be updated on-the-fly so you'll always have the latest and most current contact information on your friends and colleagues.

The directory is accessible online to all members, and includes links to all of the information you're used to accessing through the prior directories, such as APPA programs, leadership information, APPA awards, and staff information. Search the directory by logging into myAPPA at *www.appa.org.*

APPA EVENTS – 2010

February 5 APPA Exam Day – EFP

March 5 APPA Exam Day – EFP

Apr 18-22 Leadership Academy, *Colorado Springs, CO*

Apr 23 EFP Prep Course, *Colorado Springs, CO*

Apr 23 EFP Exam, *Colorado Springs, CO*

Apr 23 CEFP Exam, *Colorado Springs, CO*

Apr 24 EFP Examination, *Colorado Springs, CO*

Jul 14-16 APPA 2010, *Boston, MA*

Jul 17 EFP Prep Course, *Boston, MA*

Jul 17 EFP Exam, *Boston, MA*

Jul 17 CEFP Exam, *Boston, MA*

Jul 18 EFP Examination, *Boston, MA*

Sep 12-16 Institute for Facilities Management, *Scottsdale, AZ*

Sep 17 EFP Prep Course, *Scottsdale, AZ*

Sep 17 CEFP Exam, *Scottsdale, AZ*

Sep 17 EFP Exam, *Scottsdale, AZ*

Sep 18 EFP Exam, *Scottsdale, AZ*

OTHER EVENTS

Feb 9-12 Repowering the Future: 23rd Annual IDEA Campus Energy Conference, *Reno, NV*

Mar 21-23 Smart + Sustainable Campuses Conference, *College Park, MD*

For more information or to submit your organization's event, visit *www.appa.org/applications/calendar/events.cfm.*

2010 AWARD NOMINATIONS OPEN

Nominations are now being taken for the following APPA 2010 institutional and individual awards:

- **Award for Excellence:** Recognizes and advances excellence in the field of educational facilities.
- **Effective and Innovative Practices Award:** Recognizes programs and processes that enhance service delivery, lower costs, increase productivity, improve customer service, generate revenue, or otherwise benefit the educational institution.
- **APPA Fellow:** Recognizes specific accomplishments to date and expectations for continued involvement in APPAs leadership program through research and mentoring.
- **Meritorious Service Award:** Recognizes significant, lifelong contributions to the profession of education facilities management.
- **Pacesetter Award:** Encourages further participation in APPA among those who have already made significant contributions at the regional or chapter level.

The deadline for consideration for the 2010 awards is **January 30, 2010**. However, award submissions are accepted year-round. Awards submitted after January 30, 2010 will be held and considered in the 2011 award cycle. Visit *http://www.appa.org/recognition* for award details, and to submit for the awards.

ADVERTISE YOUR POSITION OPENINGS IN JOB EXPRESS

If you are looking for a highly qualified pool of candidates for a facilities management opening, Job Express can help you. Your ad will be posted online where it can be seen by thousands of facilities professionals who access APPA's website. The Job Express audience consists of professional facilities managers in top executive level positions, individuals who are retiring from the military with extensive facilities and engineering experience, graduates of APPA's Institute for Facilities Management, and members who have earned the EFP certificate.

Job Express gives you market exposure as an interactive online newsletter. All ads appear in one format for one low cost and are hosted online for eight weeks! Add e-mail and website links so that applicants can reach you at the click of a button. To find out more, go to *http://www.appa.org/jobexpress/*.

A SURPRISING LINK BETWEEN CLEANLINESS AND BETTER BEHAVIOR

The odor in a room is enough to elicit a stronger impulse toward fairness, researchers from the Kellogg School of Management at Northwestern University claim. They believe their research proves there is a correlation between a room's cleanliness and "decent" behavior, and that by improving our environment we can improve our behavior. Specifically, the research found an increase in ethical behavior when the scent of a fruit-scented cleaner fills a room.

The study made subjects carry out several tasks, with some asked to work in unscented rooms, while others worked in rooms freshly sprayed with lemon-scented cleaner. In one experiment, participants were given a sum of money and asked to decide how much of it to keep and how much to return to their partners who had trusted them to divide it fairly. The participants in the clean-scented room were less likely to exploit partners' trust, returning a significantly higher share. The second experiment evaluated whether clean scents would encourage charitable behavior. Participants surveyed in the clean-smelling room were significantly more interested in volunteering (4.2 on a 7-point scale) than those in a normal room (3.3). And, 22 percent of participants in the clean-smelling room said they'd like to donate money, compared to only 6 percent of those in a normal room.

This research was published in the December 2009 issue of *Psychological Science* magazine. Learn more at *www.britishcleaningcouncil.org*.

APPA BOOKSTORE

New APPA Publication!

Strategic Capital Development: The New Model for Campus Investment

by Harvey H. Kaiser and Eva Klein

APPA's newest book, *Strategic Capital Development: The New Model for Campus Investment*, presents a bold approach for planning capital investments from a strategic and long-range perspective. The authors combine their extensive higher education experience, and their specific work of the last decade to improve capital planning and decision-making, to make a case for a new model in which they seek to balance idealism with pragmatism. They define stewardship principles necessary to create and sustain a physical plant that is responsive to institutional strategies and functions; remains attractive to faculty and students; and optimizes available resources.

The book is organized into three parts:

- Part 1—provides a summary of how capital planning and funding practices in higher education have evolved from the late 1940s to the present—including case studies of relatively more effective planning models.
- Part 2—makes the authors' case for why change is needed, based on examination of environment/context factors, and articulates six key principles for 21st century facilities stewardship—the foundation for the model.
- Part 3—provides the proposed model, based on the observations and conclusions in Parts 1 and 2. Following the model overview, Part 3 provides practical, hands-on, how-to details of methodologies and data requirements, along with illustrations of many of these elements.

Order your copy today at *www.appa.org/bookstore/*.

2009 REGIONAL REPORTS

If you missed your regional conference last fall, this annual report will update you on what happened at the 2009 regional meetings.

APPA's six regions serve member institutions across the United States and Canada. They function independently from international APPA and offer their own educational programs, annual meetings, publications, and other benefits. Each region also maintains its own set of officers, committees, and activities.

Participating in regions and state and local chapters is a great way to become active with APPA. Many APPA board and committee members began their service at a regional meeting.

CAPPA
ERAPPA
MAPPA
PCAPPA
RMA
SRAPPA

Central Region

Larry Zitzow
CAPPA President
University of North Dakota

Back Row (L-R): Mark Johnson, Sara Peters, Joshua Rahn, Paul Clark, Larry Zitzow.
Front Row (L-R): Janice Troitte, Shelly Kain, Laura Thoreson.

The University of North Dakota (UND), Grand Forks, had the distinct honor of hosting the CAPPA Educational Symposium and Business Exposition entitled "Explore the Opportunities" September 26-30, 2009 The activities started early when the Executive Committee met on Friday, September 25, while other committees began their meetings on Saturday CAPPA also hosted the APPA's Supervisor's Toolkit with instructors Steve McClain and Vicki Shoecraft. Sunday was a day for exploring the city, golf, and the Sunday Night football party.

Attendees were greeted Monday morning by Mayor Dr. Michael Brown and the keynote speaker Dr. Robert Boyd, vice president for student and outreach services at UND The four tracks of educational sessions were held both Monday and Tuesday. The Monday evening meal was presented at the Ralph Engelstad Arena with entertainment by Jazz on Tap.

Tuesday began with a tour of the campus followed by an afternoon of educational sessions. The Business Exposition area was open Sunday, Monday, and Tuesday. This time was valuable to both the business partners and the members, and the support from the business partners was exceptional The evening ended with the annual banquet where the Newsletter Award was presented to Dan Whitezell, Spirotherm Incorporated. Three Certificates of Meritorious Service were presented to Sue-Anna Miller, University of Oklahoma; David Millay, University of Arkansas-Little Rock; and Ed Rice, Kansas State University. Terry Major, Southeast Missouri State University, received the Distinguished Member Award. There were four President's Awards given to Dan Whitezell and Daniel Torres, Spirotherm Incorporated; Steve McClain, University of Arkansas-Fayetteville; John Short and Bill Svoboda, EventPros Incorporated; and Steve Duncan, Oklahoma City Community College.

Larry Zitzow

John Bernhards, APPA associate vice president, and Nancy Hurt, APPA Secretary-Treasurer, were special guests of the conference. John provided an update on the parent organization and then recognized the CAPPA members who were honored at the APPA 2009 Conference in Vancouver. CAPPA has many talented members and this year those honored were Ted Weidner, Meritorious Service Award, and Dave Millay, Pacesetter Award. Dave Millay was also recognized as the Outgoing Senior Regional Representative. The installation of officers took place at the annual business meeting Wednesday morning.

2009-2010 CAPPA Officers:

President: **Larry Zitzow,** University of North Dakota
1st Vice President: **Ted Weidner,** University of Nebraska-Lincoln
2nd Vice President: **Bob Eckels,** Missouri State University
3rd Vice President: **Shelton Riley,** Texas Christian University
Immediate Past President: **J.B. Messer,** Oklahoma City Community College
Senior Representative: **John Greene,** Trinity University
Junior Representative: **Mike Johnson,** University of Arkansas-Fayetteville
Treasurer: **Sue-Anna Miller,** University of Oklahoma
Secretary: **Robin Boley,** Johnson County Community College
Professional Development: **Doug Riat,** University of Kansas
Information Services: **Terry Major,** Southeast Missouri State University
Membership: **Matt Kadavy,** Nebraska Wesleyan University
Newsletter Editor: **Vickie Younger,** Missouri State University
Historian: **Art Jones,** Black Hills State University
APPA Liason: **John Bernhards,** APPA

2010 Regional Conference

CAPPA's 2010 Regional Conference (Educational Symposium and Business Exposition) hosted by the University of Nebraska-Lincoln will be held September 25-29.

CAPPA's annual Technology Conference will be held in San Antonio Texas, February 24-27, 2010.

Eastern Region

Jim Barbush
ERAPPA President
Pennsylvania State System of Higher Education

Bob Carter & Joe Rubertone

Imagine. Imagine our world had Walt Disney not followed through a seemingly wild idea about animation and Disneyland. Imagine the joy erased had he not visualized and pursued his dream till it became reality.

The foundation of a conference is a carefully selected and developed theme. The Northern New England Chapter, under the leadership of Dan Gearan and Gordon Cheesman, selected an excellent theme that set the stage for inspirational education at ERAPPA's 59th Annual Meeting in Portland Maine on Oct. 4-7, 2009. The conference theme was *Imagine*, with a foundational quote by George Lucas – "You can't do it unless you imagine it." That theme motivated over 550 attendees and presenters to focus on solving seemingly impossible challenges that are before us. In keynotes and educational sessions, presenters proposed creative solutions to some of those challenges to representatives from 144 educational institutions and 163 firms.

Mirroring our theme, Monday's keynote speaker, Jeff Noel of the Disney Institute, with 20 years of creative experience, presented an outstanding and inspirational keynote entitled "From Inspiration to Innovation." Mr. Noel showed us how Walt Disney made dreams become reality, and therefore, assured us that we could imagine solutions and see our goals become reality in our facilities.

Continuing under our theme, Tuesday's keynote speaker was Angus King, former Governor of Maine and founder of Independence Wind, a wind power development company. Governor King presented us with innovative solutions for overcoming our energy challenges. One example was a proposal to develop technology to utilize wind in the Gulf of Maine as an energy power source. Once again, we were assured that our imaginations can become reality.

Above: Jim Barbush. Right: Jeff Noel

Exceptional educational programming was developed with 5 tracks: *Sustainability*, *Facilities Planning*, *People*, *Potpourri*, and *Utilities/Energy*. Thirty high-value sessions were presented throughout Monday and Tuesday.

We congratulate the University of Vermont for investing in an intern program and bringing four interns from their engineering schools to present energy saving projects they completed on campus. Evan Malina, Josh Hogan, Nick Chiarelli, and Travis Rohlin energized conference attendees with their youthful style in presenting their work, which resulted in significant savings. They were led by Sal Chiarelli, director of physical plant (program creator) and Richard Wolbach, energy & utilities engineer (adviser).

A Tuesday evening Awards Banquet topped off the conference with recognition of many deserving ERAPPA members. Bob Carter (McMaster University) received ERAPPA's highest recognition to an individual, The Norman H. Bedell Award. Bob has served with distinction and exemplifies the leadership qualities of the late Norman Bedell. Many others received merit and appreciation awards for exemplary efforts.

APPA's Supervisor's Toolkit was offered for the first time at an ERAPPA Conference. In addition to Toolkit sessions, the 28 participants were encouraged to experience the Annual Conference as first-time attendees. All were awarded Toolkit certificates of completion.

More information on our successful conference, its great entertainment provided, and comments from outgoing President Keith Woodward and incoming President Jim Barbush, can be found in ERAPPA's Newsletter at *http://www.erappa.org*.

2009–2010 ERAPPA Officers

President: **Jim Barbush**, Pennsylvania State System of Higher Education
President-Elect: **Terry Pellerin**, Worcester Polytechnic Institute
Past President: **Keith Woodward**, Quinnipiac University
Secretary: **Kevin Mann**, Salisbury University
Treasurer: **Lou Dursi**, Princeton University
Vice President of Annual Meetings: **Anne Richards**, Carleton University
Vice President of Chapter Affairs: **Neal Lespasio**, Emerson College
Vice President of Membership: **Greg Clayton**, University of Prince Edward Island
Vice President of Professional Development: **Michelle Frederick**, American University
Vice President of Technology & Communications: **Dan Gearan**, University of Southern Maine
APPA Liason: **John Bernhards**, APPA

2010 Regional Conference

ERAPPA's 60th Annual Meeting

Theme: 60 years of "Forging Our Future" at the Hilton Hotel by The Point State Park in Pittsburgh, PA - "The City of Steel" - "The City of Bridges," October 3-6.

Midwest Region

Gail Riese
MAPPA Newsletter Editor
Purdue University

The 2009 MAPPA Educational Conference and Annual Meeting was held Sunday, September 27 through Wednesday, September 30 at the Marriott Hotel and Conference Center in Coralville, Iowa. The meeting was hosted by the University of Iowa and was attended by 380 participants from 62 colleges, universities, and businesses throughout the Midwest. Forty-six attendees participated in a four-day Supervisor's Toolkit training session; eight others completed an APPA Educational Facilities Professionals (EFP) preparatory course, and five MAPPA members took the EFP exam.

Opening day activities began with a golf outing at the Finkbine Golf Course at the University of Iowa. Thirty-eight golfers from 25 colleges, universities, and companies participated. Members of the winning team were Hugh Barry (University of Iowa), Gail Riese (Purdue University), Adam Daugherty (Atlas Technologies), Damian Eallonardo (Skender Construction), and Gary Shields (KJWW Engineering Consultants). The evening program featured a reception for first-time attendees and a general welcome session.

Monday keynote speaker Sam Glenn recounted humorous, motivational stories and tips for maintaining a positive attitude. This was followed by concurrent educational sessions focused on topics ranging from sustainability to the economy and creative budgeting. Following the sessions, attendees visited with our valued business partners at 52 exhibitor booths. The ever-popular large school/small school exchange discussions concluded Mon-

day's sessions. That evening, University of Iowa President Sally Mason, Facilities Management Associate Vice President and Director Don Guckert, and Planning, Design, and Construction Director Rod Lehnertz welcomed guests during a reception at the Old Capitol Building.

A general business meeting was conducted Tuesday morning and included committee and officer reports. Bill Elvey, APPA's Immediate Past President and director for facilities management at the University of Texas at Dallas, remarked that MAPPA and APPA's most important resource is its members. He encouraged members to continue networking with one another.

Following concurrent educational sessions, lunch speaker Don Guckert gave a presentation on the Iowa flood of 2008. Officer elections for 2010 were conducted and Ruthann Manlet (University of Minnesota) was unanimously elected President-Elect and Kris Ackerbauer (University of Wisconsin-Madison) was elected Secretary. Additional concurrent educational sessions and on-site learning experiences followed lunch. The on-site programs occurred at the University of Iowa Power Plant, LEED capital project locations, and sites of flood recovery and mitigation.

During Tuesday's banquet, President-Elect Chuck Scott (Illinois State University) recognized members of the 2009 Meeting Host Committee and the Professional Development Committee. Bill Elvey presented MAPPA Secretary Kris Ackerbauer with the APPA President's Unsung Hero Award for his loyal dedication and commitment to MAPPA and APPA. He also congratulated Ruthann Manlet for her outstanding service as the MAPPA Representative to APPA's Professional Development Committee.

Outgoing MAPPA President John Ott (Ohio State University) expressed his appreciation to colleagues for their support during his term in office and specifically recognized outgoing MAPPA Board Members Jerry Carlson (Butler University) and Ralph Zia (Northeastern Illinois University) for their contributions. Ralph was also honored with the MAPPA Meritorious Service Award. John also presented Presidential Service Awards to Jerry Carlson, Greg Fichter (Indiana University), Brandon Baswell (Michigan State University), and past APPA President Chris Ahoy (Iowa State University).

John Ott presented the presidential gavel and a scepter to Incoming MAPPA President Chuck Scott.

2009-2010 MAPPA Officers:

President: **Chuck Scott**, Illinois State University
President Elect: **Ruthann Manlet**, University of Minnesota
Past President: **John Ott**, Ohio State University
Secretary: **Kris Ackerbauer**, University of Wisconsin-Madison
Treasurer: **Brandon Baswell**, Michigan State University
Senior Regional Representative: **Fred Plant**, Valparaiso University
Junior Regional Representative: **Martha May**, Purdue University
Newsletter Editor: **Gail Riese**, Purdue University
Information and Research: **Jeri King**, University of Iowa
Professional Development: **Doug Greenwood**, University of Minnesota-Duluth
Membership: **Kristie Kowall**, Illinois State University

Above: Chuck Scott.
Below: The MAPPA Toolkit Participants

Awards and Recognition: **Jerry Carlson**, Butler University
Professional Affairs: **Greg Fichter**, Indiana University
APPA Liason: **Suzanne Healy**, APPA

The banquet closed with a performance by the University of Iowa Steel Drum Band.

Wednesday morning featured closing remarks by Chuck Scott and University of Iowa Sustainability Director Liz Christiansen and concluded with a sustainable mini expo.

2010 Regional Conference

Next year's conference will take place October 2-6 in Moline, Illinois.

"Make a Movie" team Building Exercise held on the backlot of Universal Studios. The Sheriff, APPA President Polly Pinney, takes appropriate and necessary actions against the local "BAD GUY," Regional Rep Rob Quirk.

Pacific Coast Region

Robert John Quirk
Senior Representative PCAPPA
California State University
Long Beach

Hollywood, California was the backdrop for the 2009 PCAPPA annual conference. "Lights, Camera, Action!" was the theme chosen by California State University Northridge. The CSUN group, led by Executive Director Tom Brown and the PCAPPA Conference Chair, Ben Elisondo, took action to make this one of the best conferences held, against the worst economy that most of have seen. They not only put together a first-class "production," and it truly was in every sense of the Hollywood style, they were creative in working with the PCAPPA Board and others to assure a strong representation of the region in conjunction with the more than 45 business partners who participated.

Forty-five scholarships were granted by the Board, many of them in an outreach program to new institutions, including our community college colleagues. The marketing effort and strategic planning put forth by the CSUN team paid dividends. Combined with the program were the California State University Systems Facilities Officers, Planners and Energy Managers which provided for an opportunity to expand the attendance to a broader cross section of facilities professionals.

The efforts to gain participation were beyond commendable, but the program was the real winner! Included, were team-building exercises that featured making a variety of commercials at the Universal Studios back lots, with "Academy Award" type presentations for best commercial, actors, etc., at the Globe Theatre during the Awards Banquet. San Joaquin Chemical and AECOM lead an impressive list of business partners by providing scholarships funding to the Board and hosting many of the main events, including an evening at the famed Magic Castle. The educational programs were exceptional as well as the keynote speaker, Craig Karges, who truly inspired the crowd!

In 2010, Tony Guerrero will be hosting PCAPPA in Seattle, Washington and has promised a program of equal educational value and networking opportunities to keep our members at the cutting edge of innovation and providing the latest information to help make our educational facilities the best they can be, even in bad economic times. Now more than ever, we need to have access to our business partner solutions and the information exchanged through each other's experiences to solve our most pressing needs By your active involvement in PCAPPA, you'll be best positioned to deliver improved services to your campus and utilize your limited funding to the most strategic use!

2009-2010 PCAPPA Officers:

President: **Robyn Pierce**, Portland State University
President-Elect: **Tom Brown**, California State University Northridge
Vice President Annual Meeting: **Tony Guerrero**, University of Washington, Bothell
Vice President-Elect Annual Meeting:
Business Partner Liaison: **David Hobbs**, Portland State University

Social time during the sunset toast.

Secretary/Treasurer: **Brian Worley**, Claremont McKenna College
Newsletter Editor:
Awards Committee Chair: **Tony Guerrero**, University of Washington, Bothell
APPA Senior Representative: **Robert Quirk**, California State University Long Beach
APPA Junior Representative: **Mark Hunter**, Cal Poly, San Luis Obispo
Education Committee Chair: **Kathleen Shedler**, University of Alaska Fairbanks
Membership Chair: **John Wong**, British Columbia Institute of Technology
Info Services Chair: **Richard Storlie**, University of Nevada, Las Vegas
Professional Affairs Chair: **Tony Ichsan**, Santa Rosa Junior College, Sonoma County Junior College District
College Rep: **Towny Angell**, Reed College/Portland Oregon
APPA Liaison: **Chong-Hie Choi**, APPA

2010 Regional Conference
September 25-29, 2010
Hyatt Regency Hotel
Bellevue, Washington

Rocky Mountain Region

John P. Morris
RMA President
University of Colorado

RMA members were treated to a warm welcome at the 57th annual meeting held at the Hilton El Conquistador Resort in Tucson, Arizona, September 20-23, 2009. The host committee lead by members of the University of Arizona Facilities Management Department presented another memorable event. This year's theme was "Learn-Lead-Influence." The focus of the 2009 RMA Conference was developing our future leaders within the facilities management field.

Recognition and thanks to Chris Kopach, University of Arizona, and all the host committee members, for an outstanding conference. A special thank you also goes out to all of the RMA Business Partners, who are an essential element of the conference. Your participation, support, contributions, and presentations are critical to the success of the RMA annual meetings. We also wish a fond farewell to Wayne White for his many years of leadership as the Annual Meeting Coordinator.

Throughout the year, the RMA Board of Directors (BOD) developed a new strategic plan. The BOD agreed on the following mission statement: The mission of RMA is to elevate the leadership and influence of facilities professionals. The BOD decided that the "center of gravity," i.e., the single most important factor affecting RMA's future success was "the needs of our constituents." That is, all other efforts would be meaningless if we do not first address the needs of our constituents. The BOD also conducted a SWOT analysis (strengths, weaknesses, opportunities, and challenges) and reviewed characteristics of success in order

Deep concentration at a Techie Talk during a Business Partner break.

John P. Morris

to develop a strategic plan. The six primary goals are:

1. Update the annual meeting program to better meet the needs of the average member.
2. Create and support mentoring programs via the 14ers Club.
3. Develop an RMA communication strategy that supports marketing of programs and celebrates achievements of members.
4. Improve the scholarship program, including marketing, accessibility, and breadth.
5. Create targeted training opportunities in RMA, e.g., limited travel, state or sub-region focus, or electronic media/ webinars, etc.
6. Translate the RMA/Business Partner relationship into a more mutually beneficial association, e.g., more benefit to business partners and the average member.

RMA is also actively promoting its 14ers Club, which is unique to the Rocky Mountain region. The purpose of the Fourteeners Club (a.k.a. 14ers Club) is to:

- Promote a recognition program for individuals within RMA who aspire to greater heights.
- Support RMA in its mission to elevate the leadership and influence of facilities professionals.
- Recruit and mentor others to prepare for and fulfill leadership roles at their own institutions, within RMA, and within APPA.

At the first-timers welcome reception presenters discussed why one should become a member of RMA. One of numerous reasons to join is that RMA offers a continuum throughout an individual's career. Early in one's career, RMA provides value by offering training, networking, and learning. Later, RMA fulfills a need to share your wisdom and experience through mentoring. Overall, RMA is a conduit to transfer knowledge and wisdom, provides an opportunity for fellowship, and is a venue for melding the science and the art of facilities management. The 14ers Club is designed to enhance this conduit.

2009-2010 RMA Officers

President: **John P. Morris**, University of Colorado at Boulder
President-Elect: **Dave Button**, University of Regina
Secretary/Treasurer: **Erik van de Boogaard**, Adams State College
Communications Coordinator: **Joseph Metzger**, Arizona State University
APPA Senior Representative: **Mary Vosevich**, University of New Mexico
APPA Junior Representative: **Kevin Hansen**, Weber State University
Awards and Recognition Committee Chair: **Chris Kopach**, University of Arizona
Membership Committee Chair: **Viron Lynch**, Weber State University
Information and Research Committee Chair: **Greg Wiens**, Athabasca University
Professional Affairs Committee Chair: **Jeff Butler**, Montana State University – Bozeman
Professional Development Committee Chair: **Shawna Rowley**, Weber State University
Annual Meeting Coordinator: **Luis Rocha**, University of Arizona
Historian: **Eakle Barfield**, Montana State University – Billings.
APPA Liason: **Lander Medlinn**, APPA

2010 Regional Conference

Mark your calendars! The RMA 58th Annual Meeting will be held October 18-20, 2010 in northern Idaho on the shores of the spectacular Lake Coeur d'Alene at the Coeur d'Alene Golf and Spa Resort, with the world famous "floating green." The theme is "Reflections of Success."

Southeastern Region

Heather Hargrave
SRAPPA Vice President for Communications
Tulane University

On October 23 through 27, 2009, SRAPPA held its 2009 Annual Conference and Board Meeting at the Hilton Beachside Hotel in Daytona Beach, Florida hosted by Embry-Riddle Aeronautical University. The four-day conference was packed with events and door prizes where folks were constantly reminded that "You have to be present to win!" The weekend kicked off with a shotgun start at the LGPA Champions Course on Saturday morning. The day proceeded with bright sunshine and a beautiful golf course. That evening tropical shirts, flip-flops, and mumus were in style at a beach party held on the hotel veranda.

Sunday morning started with a welcome from Dr. Richard Heist, executive vice president and chief academic officer of the Embry-Riddle Aeronautical University, Daytona Beach Campus. After a great breakfast, morning events included a church service and a First Timers meeting followed by conference educational sessions. The exhibit hall was the location for lunch on Monday and Tuesday with prizes presented to drawing winners who were present. "Race to Green" was the conference theme with 20+ well attended educational sessions linked by the common thread of energy conservation and sustainability.

Sunday evening the entire party was transported to the Daytona 500 Experience, which is adjacent to the famous Daytona International Speedway. The experience featured an IMAX theatre, eight NASCAR simulators, many

other electronic simulators, and a "time yourself" Pit Crew area. Several exhausted amateurs gained a new appreciation of just how physically challenging being part of a real pit crew can be.

Companions of our conference attendees were provided with a list of daily events that took them on a tour of the Kennedy Space Center, the Light House and Nature Walk at Ponce Inlet, and a visit to St. Augustine to ride the trolley through the oldest city in the State of Florida.

Monday morning started with a breakfast and our keynote speaker, Mike Lipkin. Mike is the president of Environics/Lipkin and author of *One Life, One Meeting*. Mike's business is one of Canada's leading research houses, and he inspired us as he focused on 10 key social values that can reenergize us every day. Monday continued with educational sessions all day and an on-your-own night.

Tuesday morning's breakfast and Business Meeting comprised reports from key Board members and a membership vote confirming the transfer of leadership.

A campus tour of Embry-Riddle Aeronautical University was provided Tuesday afternoon where eight simulator ride door prizes were cashed in. That evening a reception and banquet was held and the new 2010 slate of officers and representatives were sworn in by Polly Pinney, APPA President. The evening was capped off with a preview of the 2010 Conference to be held at Point Clear, Alabama, the grand prize Harley Davidson 1200 Sportster drawing (won by Rebecca Griffith of ERAU), and a performance by Mike Harvey, hypnotist, who demonstrated that through the power of suggestion folks may unknowingly place a bunch of band aids on their face.

Top: ERAU host committee member Kevin Carroll with keynote speaker Mike Lipkin.
Middle: Members enjoy one of the many presentations.
Bottom: SRAPPA members showing they could make it in the pit crew at the Daytona 500 Experience.

2009-2010 SRAPPA Officers:

President: **John Malmrose**, Medical University of South Carolina
President-Elect and 2009 Conference Host: **F. Daniel Young**, Embry Riddle Aeronautical University
Immediate Past President and Junior APPA Representative-Elect: **Larry Blake**, Northern Kentucky University
First Vice President: **Paul Wuebold**, University of Alabama
Second Vice President: **TBD**
Secretary/Treasurer: **Curtis Reynolds**, Miami-Dade College
Vice President for Long-Range Planning: **Nancy Webb**, University of South Florida Polytechnic
Vice President for Communications: **Heather Hargrave**, Tulane University
Vice President at Large: **Sylvester Johnson**, Tulane University
Senior APPA Representative: **Ron Brooks**, Tennessee State University
Junior APPA Representative: **Glenn Reynolds**, Duke University Fuqua School of Business
APPA Liaison: **Steve Glazner**, APPA

2010 Regional Conference

The 2010 conference is Oct. 2 – 5 in Point Clear, AL at the Marriott Grand Hotel Resort.

Findings of the 2009 Thought Leaders Symposium

By E. Lander Medlin

Clearly the economic storm clouds that gathered in 2008 all but burst wide open in 2009, and are now considered the largest recession since the Great Depression. The Wall Street financial meltdown, plummeting real estate values, decreasing consumer, and increasing unemployment are some of the most critical factors that have created structural deficits in federal, state, and local budgets.

Although education is a critical driver of success for our economy, we cannot escape the stark reality that reduced state appropriations and corresponding state budget reductions are cascading across higher education. In some cases higher education institutions are receiving a disproportionate share of the fiscal burden. Diminishing resources and tight fiscal times will be with us for some years to come. Nonetheless, we must endeavor to maintain a stable, safe, and stimulating environment so students can learn, teachers can teach, and researchers can innovate.

To help solve our most vexing problems, education needs your best efforts, your best thinking, and your entrepreneurial spirit! This is where the work stemming from APPA's Thought Leaders series is critical.

A HISTORY OF THE SYMPOSIUMS

In the spring of 2006, APPA established the annual Thought Leaders Symposium to spark the progressive discussion and distillation of major issues impacting colleges and universities' facilities and create a forum to disseminate information on alternative ways to approach these pressing problems and concerns. The Symposium seeks to engage both the higher education community of leaders and facilities professionals in a dialogue about the future of higher education, the trends, issues, and concerns.

These types of discussions are critical to our industry because the challenges of change remain, and the myriad pressures of accessibility, affordability, and accountability are ever-present. However, to effectively manage the entire campus' physical assets in an environment of scarce resources, the educational facilities professional must understand all aspects of their facility as well as their impact on the complex mission of the institution. They must connect the goals of their operation with the educational outcomes of the institution.

> EDUCATION NEEDS YOUR BEST EFFORTS, YOUR BEST THINKING, AND YOUR ENTREPRENEURIAL SPIRIT!

The work of the 2006 Thought Leaders Symposium resulted in the distribution of the white paper titled *University Facilities Respond to the Changing Landscape of Higher Education*, which focused on the trends affecting higher education's future, and related these trends to the top 10 issues affecting facilities professionals. The 2007 Thought Leaders Symposium considered, in greater depth, three major challenges confronting higher education as a whole: evolving technology; changing stakeholder expectations; and the impact of competition on both these drivers of change. They also developed a list of the top 10 critical facilities issues. They found that broad collaboration is the neon sign for success and that technology is an integral tool to create and develop community, thereby creating connections and enhancing the channels of communication.

The 2008 Thought Leaders Symposium explored the challenges of changing demographics, accountability, and the impact of institutional resistance to change on both these drivers. Given the need for flexibility, work must continue with institutional human resource professionals to ensure outdated hiring practices and salary scales are changed to enhance staff recruitment and retention efforts. Our collective response to accountability is effective strategic planning, setting institutional priorities, and establishing corresponding performance measures to demonstrate a culture of evidence and fact-based decision-making.

2009 THOUGHT LEADERS SYMPOSIUM

The 2009 Thought Leaders Symposium took a different turn by delving into the two major subject matter areas of environmental sustainability and energy, and the impact of the economic downturn on both these issues. Although both issues are closely related, participants believed the criticality of each topic required separate treatment in the report. Specific challenges were identified, some strategies to prepare for the future were discussed, the reality of a diminishing resource base was explored, and the critical leadership role of higher education with respect to these two areas was highlighted. Indeed, environmental sustainability has become a cause célèbre for higher education and must remain a priority even during this time of economic hardship.

The challenges for sustainability will be the increasing disconnect between short-term decisions and long-term goals, making an effective business case, chang-

ing the campus organizational culture, and thinking short-term, which hampers long-term investment. Strategically, leaders need to drive change, communicate with all stakeholders, and demonstrate/celebrate all successes. The role of higher education is critical since we shape the next generation of environmental leaders and our intellectual capital remains an unmatched, somewhat untapped resource.

As for energy issues on college and university campuses, the challenges for energy action are numerous, none the least of which is energy uncertainty and volatility and their associated risks. The impact of the recession is increasing the pressure to reduce energy costs more dramatically. Institutional processes and operations campus-wide are undergoing a similar culture shift as noted for sustainability.

Facilities professionals must engage the entire community in their energy conservation efforts. Some strategies include taking short-term actions with a long-term vision, further developing incentives for increased conservation efforts, engaging in risk assessment modeling, and diversifying or leveraging alternative funding sources. In fact, energy research at higher education institutions could play a valuable role for society. Offering beta sites to experiment with different energy strategies and conservation programs could also be explored. New and different partnerships should be further leveraged to enhance more creative energy solutions.

On the second day, our facilities experts considered these two subject matter areas and their economic implications, yet expanded their focus to encompass the following critical facilities issues for 2009-2010:

- Adjusting to the new "sustainability" reality
- Developing an institutional vision of sustainability
- Creating a leadership role for sustainability by facilities professionals
- Confronting economic challenges
- Fixing broken budget models
- Managing rising energy costs and energy volatility
- Engaging the campus to address energy challenges
- Managing space
- Prioritizing renewal needs
- Meeting the challenges of workforce development

Each issue is discussed further, strategies are identified, and specific questions are formulated for facilities professionals to help their organization understand how to best position itself for the future, and further develop strategies for continued progress and improvement.

2009 SUMMARY REPORT

The summary report provides the detailed background and explanation for each of these subject matter areas and critical facilities issues along with a series of discussion questions you should use to begin a meaningful dialogue and search for solutions, and to do so collaboratively at the highest levels in the institution.

Lander Medlin is APPA's executive vice president; she can be reached at *lander@appa.org*.

Our Dream Becomes a Reality: A New Paradigm for APPA's Body of Knowledge

By Maggie Kinnaman

The thought process supporting the creation of a Knowledge Builders column in *Facilities Manager* magazine focused on how best to capture the results of cutting-edge research and new ideas. I can think of no better way to do this than report on the status of APPA's Body of Knowledge (BOK) project. Perhaps our Past President Jack Colby said it best when he described our Body of Knowledge as "captured in our *Facilities Management* manual, delivered through our educational offerings, and expanded through the Center for Facilities Research." It's obvious that all of our activities are heavily dependent upon a robust, updated, readily available Body of Knowledge.

THE HISTORY

First reported in May 2007, the BOK was the launch of a new innovative project initiated by APPA. A group of APPA members set out to update the BOK as embodied in the third edition of the *Facilities Management* manual, 12 years old. This group was not merely updating the information and delivering a hard copy publication, but instead, updating the information and incorporating cutting-edge technology. The updated BOK would be a huge digital, searchable database available to subscribers 24/7 as a "just in time" reference tool.

Furthermore, the digital format enables ease of updates so that we can capture and document cutting-edge practices that impact our profession without waiting years to update. Just think back 12 years ago: Was carbon footprint on your radar? How about total cost of ownership, emergency management, and pandemic planning? Were you concerned about green roofs, LEED certification, or energy creation utilizing solar or wind energy? Suffice it to say that our world is changing at a rate that is unprecedented.

THE DELIVERY

As Editor-in-Chief of the BOK project, I am proud to announce the completion and delivery of 18 of the over 70 new chapters that will comprise the new BOK (visit *www.appa.org/bok* for a current list of chapters and authors). The BOK is available 24/7 to subscribers, and more chapters will be rolled out to members in early 2010.

I want to specifically thank our four content coordinators—Jack Hug, Gary Reynolds, Darryl Boyce, and Bill Daigneau—and for their diligence and hard work on this project. Without

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their efforts this project would never have been possible. The role of the content coordinators is to identify, engage, and mentor the authors assigned to the chapters within each of the four core subject areas of our facilities profession: General Administration and Management; Operations and Maintenance; Energy Utilities and Environmental Stewardship; and Planning, Design, and Construction.

Providing overall logistical support and interface with our contractor EEI were the expert services of our APPA staff, specifically Anita Dosik and Steve Glazner. Also a huge thanks to the over 70 authors who have served as subject matter experts providing the content of our new BOK. Their willingness to research and document the current state of a specific concept in the context of educational facilities is awesome. I encourage you to thank each of them

BOK

Body of Knowledge

for their efforts and contribution to our profession.

Finally, no good research is complete without peer review, and each of our published chapters has undergone this review. My thanks to the peer reviewers who provided thoughtful comments and suggestions to enhance each chapter.

SUPPORT YOUR PROFESSION

So now it's up to you, our APPA members, to support your profession by subscribing to 24/7 access to the most up-to-date knowledge about our profession. Don't miss this opportunity to enhance your competence by having access to a searchable database of cutting-edge thinking, approaches, and execution strategies within our profession. Use this data, information, and knowledge to enhance your credibility within your respective institutions.

Don't miss out on the opportunity to utilize one of the key tools developed by your professional organization for the purpose of enhancing your competence and credibility within your respective institutions. This project can become your most valuable tool when facing the numerous challenges presented within educational facilities. Make your APPA membership work for you.

Past APPA President Maggie Kinnaman is the editor-in-chief for APPA's Body of Knowledge (BOK). She can be reached at *maggiekinnaman@comcast.net*.

THE 6 PRINCIPLES

OF FACILITIES STEWARDSHIP

BY HARVEY H. KAISER AND EVA KLEIN

From an historical perspective, the buildings and grounds of an institution express the legacy of past generations. In the present, our charge is the continued management and care of capital resources for the benefit of future generations. This notion of generational trust for educational facilities is consistent with the concept of *stewardship*, a term from medieval usage meaning *the keeper of the hall* or the person entrusted with the care of another person's property or financial affairs. Or, in the words of Teddy Roosevelt, the buildings and grounds of an institution must be treated "as assets which it must turn over to the next generation increased; and not impaired in value."

The notion of *value* can, and should, mean financial value. But, value has a broader implication, which includes the value an institution ascribes to its traditions, to the protection of its symbolic features, and to the continued utility of its structural components. Ideally, a statement proclaiming stewardship principles should form the grounding for a comprehensive facilities plan or master plan. Also ideally, facilities stewardship should reflect a broad responsibility of governing board members and senior leaders—in addition to the president or chancellor. Today, as the average tenure of a president/chancellor is less than seven years, their decisions must be part of a lengthy, continuous stewardship process—protected because it is an indispensable, shared responsibility.

AN EXCERPT FROM THE NEW APPA BOOK,
Strategic Capital Development: The New Model For Campus Investment

Facilities stewardship therefore means high-level and pervasive commitment to optimize capital investments, in order to achieve a high-functioning and attractive campus. It includes a major commitment to capital asset preservation and quality. Stewardship is about the long view of an institution's past and future. It ultimately forms the backdrop for hundreds of discrete facilities investment and management decisions.

Ultimately, facilities stewardship is one of the most compelling responsibilities of institutional leadership. And facilities stewardship embodies the values of the institution from the very first initiatives of any renewal process.

SIX PRINCIPLES

The model for comprehensive *Strategic Capital Development* presented in this article is grounded in six principles of facilities stewardship.

PRINCIPLE #1

LINK DIRECTLY WITH INSTITUTIONAL STRATEGIC PRIORITIES

Principle #1 may seem self-evident. Yet, strangely, in higher education, it is not always the case that campus facility investment decisions are tied directly to priorities in strategic plans. In part, this occurs because institutions do not always have strategic plans that *actually guide priorities and decision-making*. An institution may engage a planning firm for a campus master plan without first having a foundational set of strategic programmatic priorities. In such cases, master planning architects must back into a strategic plan, since the physical plan must respond, in some way, to a strategic program framework.

In other cases, a master plan may be produced that represents aspirations for facilities, but lacks any basis by which to prioritize projects that do not rise to the level of core priorities. Programmatic planning and capital planning are hard to link, as they typically are associated with distinctly different processes and cycles for operating budgets, degree program planning, and capital requests. This is especially true for public institutions.

At its best, strategic planning is about *designing the future*. An effective strategic plan:

- Takes account of the institution's internal and external contexts
- Emanates from a creative but "managed" constituent dialogue
- Eventually articulates a limited number of central directions, or priorities
- Does not attempt to plan every potential implementing tactic
- Articulates metrics to be achieved, where appropriate.

If an institution has such a plan, then the initial activities in *Strategic Capital Development* are to develop a cogent statement of high-level principles for the physical campus and its facilities—derived from, and compatible with, the articulated directions and priorities in the strategic plan.

PRINCIPLE #2

MAKE FACILITIES AN INSTITUTION-WIDE LEADERSHIP RESPONSIBILITY

In higher education, the silo-style structure of administrative organizations is a problem for planning and decision-making, perhaps nowhere more than in the facilities planning realm. We err if we treat facilities stewardship as principally the responsibility of the financial and facilities managers of the institution—with others participating and providing "input." If facilities stewardship encompasses a broad array of functions from big-picture planning and capital investment decisions to pragmatic challenges of construction and operations, then that stewardship is a fully shared institution-wide responsibility of the academic, research, and student affairs leadership, along with the financial and facilities leadership.

Several successful investment models were led by multidisciplinary teams—rather than led by the facilities and finance officers. At the top level of leadership, depending on the institution, facilities planning should be a partnership of at least the chief executive, chief academic, and chief business officer. In some settings, additional vice presidents are included in the top leadership group.

Bringing in leaders who are not from the financial and facilities management structure is not just about "getting input." These academic, student affairs, research, and community/economic development administrators and faculty bring perspectives that add considerable creative value. Conversely, inclusion of senior non-facility and non-financial administrators has the benefit of immersing those participants in the financial and pragmatic aspects of the planning decisions. For example, every facilities officer knows how hard it is to sell basic infrastructure improvements as priorities—however necessary they may be. Everyone, except those who actually have to run the campus, can get more excited about a new building than about underground steam lines—although users will not hesitate to complain if their rooms are too cold or when technology breaks down. It is always useful to engage the attention of non-facilities personnel on the nature, extent, and urgency of projects that, for example, extend electrical service, control storm water, or strengthen technological capacity—if possible, making infrastructure just as much their problem as a new classroom building would be.

Another key element in engaging deans, department chairs, and faculty, is to engage them in facilities planning and prioritization at an "institutional" or "strategic" level—not only from the perspective of their own space and buildings.

PRINCIPLE #3

CONDUCT COMPREHENSIVE ASSESSMENTS OF NEEDS

Although there is no way to obtain an exact dollar estimate, it is evident that higher education institutions spend consider-

able sums on capital needs assessments or capital planning. For too long, an episodic pattern of needs assessments—often consisting of only one category of needs, has characterized our capital planning. For example, institutions (or systems) occasionally undertake space utilization studies; as a result, they will have good current information about quantitative space needs and utilization. And it has become common for institutions to undertake condition audits; as a result, they develop good data, often very detailed, about deficiencies in building and infrastructure systems. Frequently, specific engineering studies are undertaken. There are many forms of special studies; for example, housing market studies and master plans' utilities studies, way finding studies and plans, and historical preservation studies. And, of course, there are the ubiquitous master plans (which often do not include rigorous needs analysis to arrive at prioritized capital projects, and core estimates). With a master plan, a senario for future campus development and a wish-list of facilities are achieved.

It is rare for all categories of capital needs to be studied at one time. This fact is one of the reasons that compelled the authors to expand the topic for this book from capital renewal to comprehensive *Strategic Capital Development*. A core premise of our new APPA book is that the best use of scarce resources (and an optimal campus environment) can be achieved only when all categories of needs are assessed at the same time and then prioritized to create a baseline *Strategic Capital Development Plan*. Updates for various elements, of course, are needed periodically.

PRINCIPLE#4

ACHIEVE CREDIBILITY FOR CAPITAL INVESTMENT DECISIONS

Perhaps the most compelling argument for achieving credibility is that credibility can lead to increased resources. A newly elected governor was recently faced with a facilities capital program recommendation in excess of $1 billion. After reviewing the proposal, and consulting with staff responsible for study findings, the governor announced endorsement and presented to the state legislature a first phase of funding for a $300 million bond program. The justification for such a rapid review and approval was stated as trust in the credibility of the process that led to the recommended investments.

In general, credibility is markedly enhanced by sophisticated analyses; sound, reliable data; and transparency achieved by good communications strategies.

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ANALYSIS AS COUNTERWEIGHT TO POLITICS

Those who are at the center of capital allocation decisions for educational facilities, most typically the president or chancellor and one or more vice presidents and vice chancellors, find their decisions subject to review from both above and below—from governing boards and from the deans, department chairs, and faculty. The criteria for agreement and approval by governing boards and by faculty and staff may not be at all the same. Furthermore, in the case of public systems, the presidents/chancellors always look laterally at what their counterparts, with whom they compete for resources, are proposing and achieving. Finally, capital priorities and allocation are matters in which scores of different opinions and priorities may emerge.

It is clearly the case that politics of one kind or another often plays a considerable role in capital allocation priority decisions. People know this, and, while they will seek to use politics to their advantage, if the decisions do not go their way, they will have reasons to challenge the credibility of those decisions. It is not unusual for a legislative body to insert a project into a public institution's capital priorities. Then, from within an institution, it is not unheard of for a particularly strong department or school to push its project to the top of a list, by sheer influence. To the extent that a new approach to *Strategic Capital Development* can rely on strong data, credible analytical approaches and findings, and open processes, the worst of politically driven decisions may be averted—thereby imbuing the outcomes with greater credibility.

CONSISTENT, RELIABLE DATA

Despite a large array of books, articles, seminars, and conference presentations on capital renewal/deferred maintenance and capital asset management strategies, considerable confusion still remains about the use of terminology. Incorrect use of terms and inconsistent application of terminology and methodologies do not make it easier to sell the need for resource investments.

Because it is difficult to gain consensus on proprities, both among those who provide resources and among users of facilities, it is important that terminology be applied consistently and understood uniformly by participants, including both decision-makers in and beneficiaries of the strategic capital development process. Definitions an institution uses should be consistent with those accepted throughout the field of higher education. One excellent reference for terminology is provided in *Asset Lifecycle Model for Total Cost of Ownership Management*, in which the authors recommend terms and metrics.[1]

COMMUNICATION

Communications strategies are at the heart of building credibility. In higher education, consensus is highly valued. Unfortunately, a prioritized capital plan forces choices in a way that makes complete consensus nearly impossible. If it is the case that not everyone will have their wishes fulfilled, then an open, process in which all participants can see the analyses developed and the resulting decisions unfold is the only plausible antidote to general unhappiness with outcomes.

Best practice case examples offer guidance on elements of a strong

communication strategy that enhances credibility of a *Strategic Capital Development Plan:*

- Begin at project initiation
- Define stakeholders' roles and responsibilities
- Form working committees
- Develop and use Internet and media strategies
- Provide regular briefings and deliver frequent progress reports in the form of work papers
- Engage the governing board, campus leadership (administrative/academic), and faculty/staff
- Inform legislative leadership and committees regularly
- Cultivate local press and business community representatives, and engage the general public.

In the art of communications, there is one more important factor—personal leadership. The credibility of decision outcomes can be enhanced by the leadership style of the institution's chief executive officer. We have seen cases in which a leader's compelling vision, sense of humor, grasp of the complex issues, deference to technical expertise, and personal charm were critical to achieving consensus. A dash of charisma definitely leavens the dialogue and helps sell analytical outcomes.

PRINCIPLE #5

ENSURE ACCOUNTABILITY IN IMPLEMENTATION

As important as are credibility and transparency in the planning process, it is equally important for implementation of the Plan to be carried out responsibly.

Accountability exists on at least two levels—overall plan performance and specific project execution.

PLAN PERFORMANCE

At the macro level, all the audiences and constituencies deserve to have periodic performance evaluation—to document progress over time in campus and facility improvements. For example, if a Plan contains a significant component for building systems renewal, it is important to report periodically on the portion of the work that has been accomplished. Periodic performance evaluation or reports on progress on the Capital Development Program is the way to sustain commitment to the Plan. Also, any major changes to the Plan must be thoroughly explained (after being thoroughly vetted). Some questions to incorporate into an overall performance review are:

- What measured improvement has been achieved in the overall condition and functionality of the facilities?
- Are there increases or decreases in the expected useful life of the capital asset portfolio?
- Has a combination of capacity and modernization projects served to "right-size" campus space, by space types?
- Is there improvement in allocation of space to programs
- Is academic (instructional) space used more efficiently?
- Is expensive, specialized research space used productively?

PROJECT EXECUTION

On a micro level, the level of project execution, accountability entails adherence to project budgets and schedules; effectiveness in issuance and management of complex contracts; and delivery of the intended result.

- Are capital projects adhering to project delivery budgets and schedules?
- Does the project design, bidding, and management process have adequate safeguards in place to ensure integrity and avert potential malfeasance in the use of the resources?
- Is there an improvement in facilities operating costs as a result of completed capital projects?
- What is the feedback of facilities users in the case of completed capital projects?

PRINCIPLE #6

SUSTAIN CONTINUITY, EVEN THROUGH LEADERSHIP CHANGES

Capital asset development and renewal are, by definition, long-term, multi-year activities. Even a single large project can take several years to plan, bid, construct, and commission. More often than not, projects are linked. A new building sets in motion a string of relocations and renovations, with use changes in other buildings. A major building modernization requires swing space solutions. Various infrastructure needs must be met in correct sequence with building projects, and so forth.

In cases where it is possible to ascertain the amounts of funding that will be available and the sequence of projects to be executed over a multi-year period, there is the clear potential of achieving greater efficiencies and fewer disruptions.

For all these reasons, leadership turnovers, if they bring radical or sudden change to capital priorities, are disruptive. Frequency of turnover in senior administrative positions is of concern because of the possibility of different philosophies about facilities stewardship and different project priorities. Institutions are especially susceptible to shifts in philosophy and priorities if they do not have a well-developed *Strategic Capital Development Plan*, in which many hands left fingerprints. Continuity is a hallmark of good facilities stewardship. A comprehensive plan, comprehensively developed, is the best defense against the shifting-sands syndrome.

Harvey Kaiser is president of Harvey H. Kaiser Associates, Inc., Syracuse, NY; he can be reached at *hhkaiser@att.net*. Eva Klein is president of Eva Klein & Associates, Ltd., Great Falls, VA; she can be reached at *evaklein@evakleinassociates.com*. They are the authors of the new APPA book, *Strategic Capital Development: The New Model for Campus Investment*, from which this article was excerpted. To order, visit *www.appa.org/bookstore*.

NOTES

1 *Asset Lifecycle Model for Total Cost of Ownership Management: Framework, Glossary, and Definitions*. Alexandria, VA: APPA, Federal Facilities Council, Holder Construction Company, International Facility Management Association, and National Association of State Facilities Administrators, 2004.

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You first have to know what type of information is needed for capital planning. Proper planning includes capturing information on all structures, building components and systems. An accurate facility needs assessment must identify building deficiencies and project the cost to repair or replace those deficiencies. Historically capital planning has involved an in-depth facility condition assessment (FCA). This approach can be both time-consuming and costly.

Introducing Life Cycle Modeling

Life cycle modeling is breaking traditional thinking around capital planning. This methodology uses facility type, gross square footage, construction and renovation dates, life cycles, and cost of replacement for institutionally defined facility subsystems to calculate annual facilities renewal needs. Predicted renewal costs are then aggregated by building and time period to project future renewal needs. Although predictions of life cycles and replacement costs are based on industry standards, they can also be adjusted to reflect actual expenditure data provided by the institution.

Technology assisted renewal analysis (or TARA for short) can be used to accurately calculate maintenance needs at a much lower cost than an FCA. While the assessment approach averages approximately 15-cents per square foot, the cost of using technology assisted renewal analysis is less than 1-cent per square foot. Once the life cycle model is implemented, an assessment can be done annually—or at any desired cycle—so that data remains current. Link this data to an automated work order management and preventive maintenance system and the result is an ongoing process of facilities maintenance and capital planning.

A Winning Combination

Another option is to create a hybrid method that incorporates both the life cycle modeling and FCA approaches – the best of both worlds. While a full FCA can be cost-prohibitive, once a specific area of need is identified by technology assisted renewal analysis, a more targeted FCA can take place. Using this approach, an institution can obtain more detailed insight for specific priority needs.

Utilizing a web-native capital planning system allows stakeholders across an organization to track and access valuable facility assessment data online, in real time, for immediate analysis, prioritization and costing. SchoolDude.com sees the value behind technology assisted renewal analysis and has incorporated this TARA methodology into its solution for capital planning, PlanningDirect. Users can easily document facility needs and develop an action plan based on a funding forecast, and that real-time facility plan can be quickly updated throughout the year, as facility needs, priorities and budgets evolve.

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DEFERRED CAPITAL RENEWAL

as a Spoiler for Campus Programs

by **Joe Whitefield**

It happens in practically every sport in every season.

A great team is denied a shot at a championship game or the playoffs because, at a critical time in the season, they are defeated by a lesser team with no championship hopes and nothing to lose — the dreaded *spoiler*. Coming off of their own poor performance, spoilers seek a measure of satisfaction by spoiling the impending success of their opponent. Most, if not all, sports fans can remember a particularly painful loss to a spoiler that cost their favorite team success. In some cases the losses are so significant that teams suffer setbacks that take years and decades (you know who you are) from which to recover.

For facilities managers, deferred capital renewal (DCR) is the issue that, in many ways, can play the role of spoiler for other programs and initiatives are that important to their campuses. In particular, operations and maintenance programs, campus growth strategies, and even sustainability programs can suffer setbacks caused by the unplanned system failures and/or the significant funding required for an adequate capital renewal program.

In looking at the issue of DCR as a spoiler to higher priority programs, the viewpoint of this article intends to be simply an economic look at the challenges and some opportunities present when dealing with this topic. This approach encourages a more integrated view of DCR and its physical and financial relationship with other institution programs and their objectives. Since these programs require funding and other resources, they must be prioritized and various elements traded off in order to be effective.

one action that may prove useful in developing an action plan for CDR is to categorize the facilities/systems according to their value to the campus.

QUANTIFYING DCR AND ITS RISKS

Buildings, their support systems, and their required utility infrastructure all have a useful life. Often, the useful life of a system can be prolonged by an effective operations and maintenance (O&M) program including preventive and/or predictive maintenance activities. Of course the useful life of a system can be shortened in the absence of an effective O&M program. Either way, it is a matter of when a system is no longer adequate and should be replaced – this typically requires capital funding. For this reason, the term "deferred capital renewal" is often more preferred today that "deferred maintenance".

QUANTIFYING DCR

There are different methods for quantifying DCR. One method I favor uses a fairly simple formula for estimating the annual capital renewal ($) of a building, or buildings, and aggregating that figure over a specified time period. Consider the following formula, adapted from "Three Approaches to Setting Recapitalization Rates, *FM Date Monthly*, August 1997:

ACR = 2/3 * CRV * (building age/1275) where,

ACR= Annual Capital Renewal

CRV = Current Replacement Value of the building

1275 = sum of the years digits for a 50-year life of a building

This formula is based on a model of investing two thirds of the current replacement value of a building in capital renewal over a 50-year life of the building. The implication is that capital renewal in excess of two-thirds the replacement value indicates the need to build a new facility. Of course, many campuses have buildings older than 50 years, so some scaling and adjustments to the formula may be reasonable.

To convert this estimate to DCR for a campus, one could:

- Apply the ACR over a period of time (say 20 years) and total the amount
- Include a factor for associated infrastructure if served by central plant utilities (say 25%)
- Deduct Capital Renewal investments over the same period

This would give an overall estimate for DCR fairly quickly by simply evaluating the age and current replacement value of each facility. Keep in mind it is a broad look at the campus intended to provide a sense of scale of the problem.

RISKS OF DCR

Quantifying DCR is one thing, understanding the risks it posses to operations is another. These risks run the gamut from minor system failures and interruptions in service (brief utility outages, roof patches, etc.) to more catastrophic failures that have cascading effects (major outages shutting down events, programs, etc). Generally speaking, the more severe the DCR condition, the more frequent disruptions will occur – usually at higher costs associated with repairs for systems that have been run to failure.

The problems associated with DCR can be sneaky. Checking maintenance records may show chronic problems that are small but constant. Other times DCR can seem somewhat dormant until a rash of larger problems arise—typically at the most inopportune times. On a side note, it is recommended that major risks associated with buildings and utility systems should be identified and included as part of any formal risk assessment program for the campus.

For this discussion, one action that may prove useful in developing an action plan for CDR is to categorize the facilities/systems according to their value to the campus. One example can be taken from an exercise performed by Middle Tennessee

Table 1 –
Overall Building Rating (*)

		Current Condition		
		90-100	80-90	<80
Potential Value	High	A	B	C
	Medium	A	B	C
	Low	D	D	D

Table 2 —
Deferred Capital Renewal for Educational and General Facilities (*)

Overall Building Rating	Square Footage	20-YR Deferred Capital Renewal
A	1,267,353	$19,297,167
B	977,395	$49,955,169
C	297,334	$31,204,298
D	95,614	$5,937,337
Other	67,808	$1,919,804
Infrastructure		$27,078,443
20-YR Capital Renewal/ Capital Maintenance Funding		($23,380,000)
Totals	2,705,504	$112,012,217

(*) Taken from Middle Tennessee State University Campus Master Plan, February 2007

State University. MTSU evaluated several building factors in determining an overall rating for each facility. These building factors include:

- Current Condition (0 – 100 rating scale) - determined by a facility condition survey performed in 2007
- Potential Value (High, Medium, Low rating scale) – a subjective assessment of elements such as land use, academic program suitability, code issues, original campus structure, etc.)

The Current Condition and the Potential Value are combined to produce an overall rating of A, B, C, or D. The overall rating is determined by the following [Table 1]:

Applying the DCR formula stated above to the campus facilities and combining it with the Overall Building Rating produces the following [Table 2].

Overall, the result of this exercise is useful tool for assessing some of the DCR risks, in particular where they may materialize, and for establishing various program priorities, trade-offs, and opportunities.

DCR AS A SPOILER

By now, most facilities managers are familiar with the impacts excessive DCR has on operations and maintenance (O&M). System failures brought on by DCR play havoc with O&M budgets

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that are already under pressure. Corrective maintenance is urgent and expensive compared with preventative maintenance. As the frequency of system failures increase more funding is required—at the expense of other priorities. Within the O&M budget, non-maintenance services (cleaning, grounds, etc.) are reduced and/or preventive maintenance type services are reduced which only exacerbates the problem. Funding provided outside the O&M budget is at the expense of other campus programs.

Drawing resources away from other programs and initiatives is the primary way DCR spoils things for an institution. When adequate funding is not available the inevitable system failures will physically impact the programs and events. Either way, the campus suffers in its appearance and functionality by the effects of DCR over time. Again there is considerable understanding on this issue through experience and considerable literature on the subject.

Still, there are two other areas of concern for today's facility manager where DCR has the potential to be a spoiler.

CAMPUS GROWTH

Over the past 10 to 15 years, many campuses have been experiencing significant growth in enrollment, additional facilities, and additional academic and athletic program needs. Much of the time, growth related projects come quickly with insufficient attention to or funding for the increased capital or operational requirements. Examples include:

- New building projects that add to the total inventory requiring O&M services and future capital renewal
- New building projects that add load to utility systems and infrastructure without adequately addressing the increased costs to these systems
- New building projects that don't fully address the renovation needs of the existing facilities involved in the tenant and program shuffling that comes with new space
- Increased enrollment increases the load on existing facilities accelerating the effects of DCR
- New programs and equipment occupy spaces not fully equipped with the utilities to meet their requirements

In these cases, growth impacts DCR by 1) simply adding to the facility stock requiring capital renewal, 2) leaving a portion of the total capital cost to be covered in the future by a capital maintenance budget, or 3) adding to the O&M burden in such a way as to siphon funds away from other maintenance priorities.

The counter to these problems is to identify these areas of concern and address them in the planning and budgeting sessions. It typically makes great economic sense to address several DCR items as part of most new construction projects. Motivation to address outstanding capital renewal needs may be uniquely present along with potential economies of scale. This disciplined process requires assessing the full impacts of growth and evaluating the benefits of addressing the problems up front - even if something else has to be traded-off.

Failing to adequately plan and budget for the additional O&M and capital needs brought on by growth will only add to the economic burden of the campus. Over time, this type of burden can cripple any organization. In fact, author Jim Collins, in 2009's *How the Mighty Fall*, cites the "undisciplined pursuit of more" as one of the five stages of decline for companies and organizations that ultimately fail. Incidentally, another stage in this decline is the "denial of risk and peril." This sounds a lot like DCR and its risks associated with campus growth.

SUSTAINABILITY

Many campus sustainability programs are currently in some form of development. These programs are considering initiatives to improve efficiency in existing buildings, design and construct new facilities to operate efficiently, reduce carbon and greenhouse gas footprints, educate constituents, comply with regulations of some type, etc. Once again, DCR can act somewhat as a spoiler these initiatives if not properly addressed.

Failing to adequately plan and budget for the additional O&M and capital needs brought on by growth will only add to the economic burden of the campus.

Most of these programs involve addressing the energy efficiency of existing facilities. To that end, there are many opportunities for reducing energy consumption through retrofit projects. Similar to new projects, it is tempting to limit the project scope in ways that leave the costly system replacements for some time (or someone else) in the future. This approach may diminish the anticipated energy results.

It would be desirable for sustainability initiatives to help address wider capital renewal needs. In many cases, sustainability projects have an opportunity to do so. It often becomes a matter of the economic performance of the project if paybacks are required or initial investments are limited. Also, certain measures such as lighting retrofits have favorable economics allowing for additional measures to be bundled.

In addition, there are some unique economic considerations for other elements of a sustainability program. One is the overriding decision to make-or-buy energy benefits. Consider the following options::

- Reduce energy consumption through retrofit projects (demand-side)
- Purchase green energy or environmental credits through

the utility provider or a marketer (supply-side)

- Install renewable generation on campus (supply-side)

Each of these options should be compared with one another evaluating total investments, operating costs, and paybacks. Each scenarios presents a different set of challenges and opportunities when considering DCR.

SUMMARY

Deferred capital renewal is a condition for most campuses that has proven to be a spoiler for many other programs and initiatives. It posses physical risks in terms of continuity of operations as well as well considerable fiscal risks to both operating and capital budgets. Accounting for these risks and developing funding and operational strategies to stay somewhat current on capital renewal needs while gaining some ground on the DCR are important steps for institutions. At the same time, it is also important to account for DCR implications as part of a campus growth strategy or a sustainability strategy. Some recommended steps in this process include:

- Adopt an economist view of the DCR condition – consider its risks to other programs, prioritize objectives, think "trade-offs" instead of "solutions"
- Quantify DCR in order to develop a sense of scale
- Categorize DCR along with other facility and physical plant elements to assist in assessing risk factors and setting DCR priorities and funding strategies
- Seek to address DCR needs with other campus programs such as O&M, campus growth programs, and sustainability initiatives
- Seek to address other campus program needs with a capital renewal program
- Recognize that DCR, campus growth programs, and sustainability programs each require large investments of capital funding. Through planning and budgeting, each program has some opportunity to support the other – to a point. After that, they become programs competing with each other for the limited funds and resources.

In short, spoilers are successful because of a lack of preparation in dealing with them. DCR is not much different. Lack of funding is one thing, lack of consideration is another. Don't let DCR negatively affect the other important campus programs by looking past its risks and simply hoping it remains dormant.

Joe Whitefield is executive director of facilities services at Middle Tennessee State University, Murfreesboro, TN. He can be reached at *jwhitefi@mtsu.edu*.

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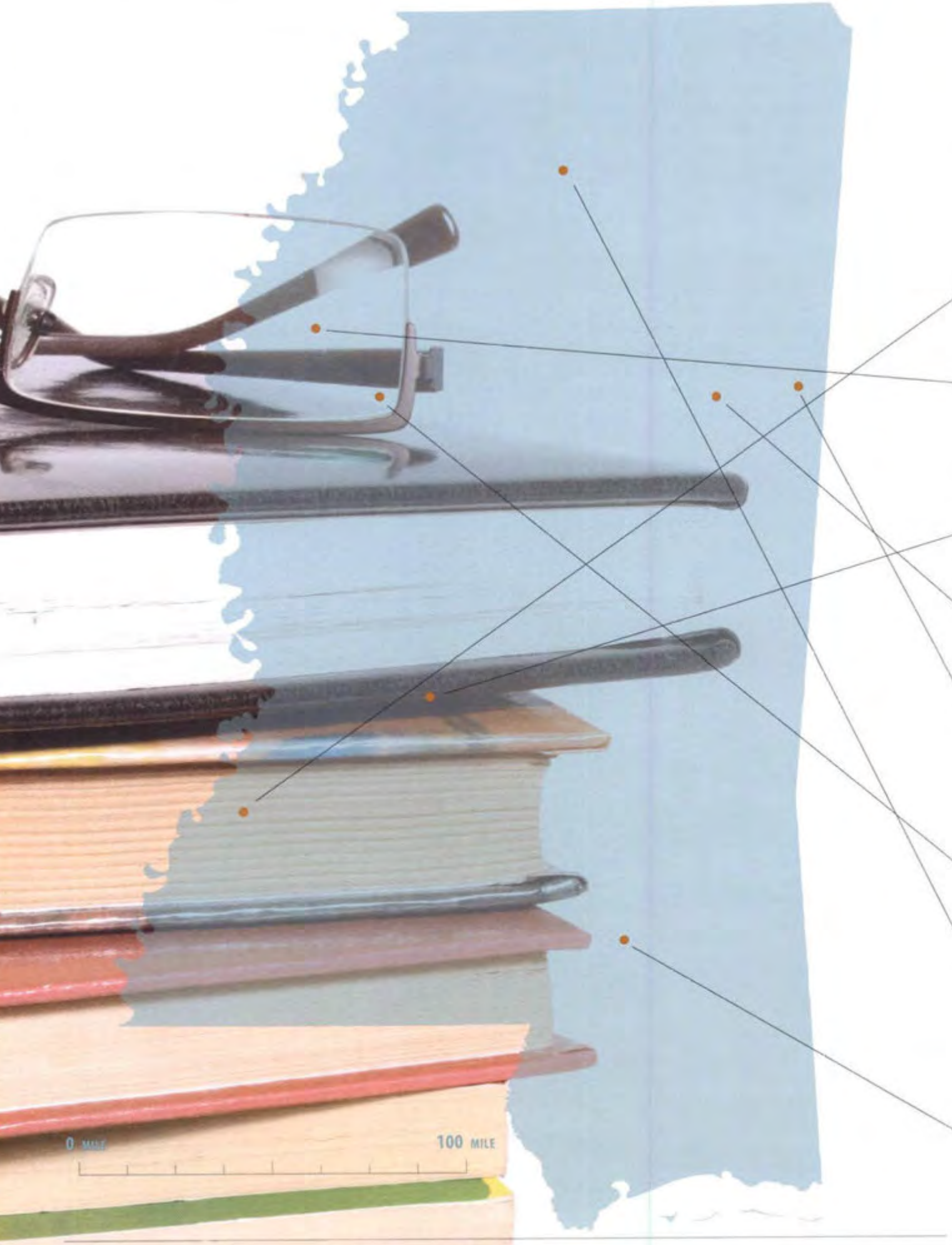
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STATE OF MISSISSIPPI CAMPUSES STEPUPTOTHECHALLENGE

In today's environment, if you are standing still, you are falling behind. Making the right decisions at the right time is critical. Following through on those decisions is challenging and can take courage. One example of a group of institutions and facility management professionals stepping up to the task and having the courage to challenge the status quo is the State of Mississippi Institutions of Higher Learning (IHL).

We all know that the organizations that produce excellence are those that continuously improve. Success, the kind that leads to great facility services, is built on the foundation of a huge amount of hard work over many years. Mathematicians will tell you that the only way to learn math is to do math. When you do lots of it, you quickly find out whether you're right or wrong with each problem you try to solve.

Yet in campus facilities management you often find people and organizations who have been doing something for a long time; some are very good at it but don't always know it, and some just aren't very good at it and don't always know it. Why? Lack of feedback.

APPA recognizes, congratulates, and thanks the IHL universities for their contribution of knowledge and experience in conducting the Facilities Management Evaluation Program (FMEP) at all State of Mississippi State Universities. We applaud the campus facility management leaders who work so hard and had the courage to open up and display their organizations and their campus facilities to close scrutiny and critical review. This is a truly extraordinary action by campus administrators and facility managers.

The IHL as a system of higher education consists of a mixture of universities with challenging environments and settings that contain all of the complex elements requiring consistent application of professional facilities management practices.

Because of the institutional focus on achieving and sustaining a leadership position in education, these requirements and demands for high-quality campus facilities and facilities services is rigid and persistent.

BY JACK HUG, APPA FELLOW

"The FMEP process is an invaluable learning tool for any facilities manager. My experience on the 'evaluator's side' revealed the honest intention the team has of simply trying to properly evaluate the entire FM process.... Not only did we end up with a plan to guide us in our goals for the next few years, but we were able to build a network of professionals that were familiar with our campus and its unique requirements for future reference."

Mike Switzer, P.E.
Director of Engineering Services
Mississippi Institutions of Higher Learning

THE INSTITUTIONS OF HIGHER LEARNING

The Board of Trustees is the constitutional governing body of the State of Mississippi Institutions of Higher Learning. Under the leadership of the Board of Trustees, the Institutions of Higher Learning provides guidance and management for the public universities in Mississippi. The Board oversees degree-credit courses at the eight universities, the University of Mississippi Medical Center, ten off-campus centers, and various other locations throughout the state. All eight universities offer master's level programs, six have programs at the education specialist level, and five offer doctoral-level programs. The University of Mississippi Medical Center is the health sciences campus of the University of Mississippi.

The Real Estate and Facilities Division of the Institutions of Higher Learning is charged with the responsibility of managing all affairs relating to the capital improvement process, repair and renovation programs, property management, and Education Building Corporation activities. Objectives of this division are to work with each campus to ensure that campus facilities adequately address academic needs of the institutions; that needs are determined and prioritized for funding; that funded projects are monitored and kept on schedule to optimize results for expenditures; and that maintenance programs are reviewed and monitored for effectiveness.

Mike Switzer served as the initial contact person to help launch the APPA-FMEP project. During the time of campus self-evaluations and campus site visits, Mike served as the IHL director of engineering and for one year also the director of facilities management at Delta State University. He has since returned to IHL as director of engineering. Mike had the unique experience of serving in three different roles during the FMEP activity—as an observer of the FMEP process self evaluations, as a team participant for the first campus assessment, and on the receiving end of the evaluation process while serving as director at Delta State University.

Jessie Stephney, associate vice president facilities management at Alcorn State University, served as director of engineering for IHL for all but two of the campus site visits. Jessie regularly met with the FMEP review teams prior to the beginning of each campus site visit and attended the exit review and verbal report sessions that the FMEP team members conducted on the last day of each campus site visit.

Jessie has this to say about the FMEP experience:

"APPA's FMEP provides facility managers an opportunity to get feedback from their peers without any hidden agendas. The review team uses their vast experience to evaluate the condition and direction of your facility management department. The evaluators consider each institution's unique characteristics when performing the evaluation. As a result of the FMEP, facility managers will have the tools they need to justify changes in staffing levels, to improve services, and to garner the support of the university community."

COMMENTS FROM OTHER STATE OF MISSISSIPPI CAMPUS FACILITIES MANAGERS

"If you produce just one idea for improvement or a list of things to improve that will help you become a better organization it is worth the effort. You can use the list of recommendations to get agreement from the administration on priorities."

"Our list of recommendations that we received from the site visit team are big-picture opportunities like developing a performance measurement system, and using the FPI survey and Balanced Scorecard."

"I have to say that I prepared myself for the worst and ended up with a really pleasant experience."

"Gaining a better understanding of customer requirements and improving employee satisfaction are examples of our new priorities."

"Developing a practical process for a small campus facilities department is something we really need to do. The review team gave us a roadmap for how to do this."

"If you do an FMEP and close the gaps that the self-evaluation and the site visit reveal, you will develop a competitive advantage. It will enable you to provide improved service to your customers."

"The FMEP helped us realize the importance of what we do and how interested the campus administration is in facilities and what we do."

"This experience and the team report will help us achieve our goal to become a facilities department that the campus can be proud of."

A LOOK AT THE CAMPUSES EVALUATED

Alcorn State University, the oldest predominantly black land-grant university in the United States, had its beginning in 1830 as Oakland College for the education of white male students. Alcorn State University is a coeducational, liberal arts and sciences, and teacher education public institution offering programs leading to associate, baccalaureate, masters, and educational specialists.

Located in Lorman

Associate Vice President Facilities Management, Jessie Stephney

Delta State University was created as Delta State Teachers College by an act of the state legislature in 1924. The institution opened for its first regular session on September 15, 1925, with a

faculty and staff of 11 members and an enrollment of 97 students. Today, the Mississippi Delta, a 20-county, northwestern region rich in various ethnic and cultural groups, provides approximately 80 percent of the university's enrollment.

Located in Cleveland

Director Facilities Management, Tommy Verdell

Jackson State University was founded as Natchez Seminary in 1877 by the American Baptist Home Mission Society to serve the great Mississippi Valley between Memphis and the Gulf Coast. The school opened on October 23, 1877 with 20 students, and it operated as a private church school for 63 years. In 1882 the Society moved the school from Natchez to Jackson. In 1894, the university was moved from its original site in north Jackson to a new tract of land in the southwest section of the city. The state assumed support of the college in 1940. The name was changed to Jackson State College in 1956 and to Jackson State University in 1974.

Located in Jackson

Director Facilities Management, Wayne Goodwin

Mississippi State University began as the Agricultural and Mechanical College of the State of Mississippi, one of the national Land-Grant Colleges established after Congress passed the Morrill Act in 1862. It was created by the Mississippi legislature on February 28, 1878 to fulfill the mission of offering training in "agriculture, horticulture, and the mechanical arts without excluding other scientific and classical studies, including military tactics." The college received its first students in the fall of 1880. In 1926 the college received its first accreditation by the Southern Association of Colleges and Schools. In 1932 it was renamed Mississippi State College. In 1958 the legislature renamed it Mississippi State University.

Located in Starkville

Executive Director Facilities Management, Jim Jones

Established in 1884, *Mississippi University for Women* became the first public college for women in America. Originally known as the Industrial Institute and College, the institution was created by an act of the Mississippi legislature on March 12, 1884 for the dual purposes of providing a liberal arts education and preparing women for employment. The first session began October 22, 1885. The name of the institution changed to Mississippi State College for Women in 1920, then in 1974 to Mississippi University for Women. In 1982 the United States Supreme Court ordered the university to admit a male student to the nursing program. Following this historic decision, the Board of Trustees of State Institutions of Higher Learning ordered the university to change its policies to allow the admission of qualified males into all university programs. In 1988 the Board of Trustees reaffirmed the mission of MUW as an institution of quality academic programs for all qualified students with emphasis on distinctive opportunities for women.

Located in Columbus

Director Facilities Management, Sam Wise-Sodexo

Mississippi Valley State University was created by the Mississippi legislature as Mississippi Vocational College in 1946. The expressed purpose of the institution was to train teachers for rural and elementary schools and to provide vocational training. The first academic session started in the summer of 1950. In order to reflect the broadening scope and offerings of the institution, its name was changed to Mississippi Valley State College in 1964. The name of the institution was changed to Mississippi Valley State University in 1974. Graduate programs were begun in 1976.

Located in Itta Bena

Director Facilities Management, Derrick Bell

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The *University of Mississippi*, one of the oldest public institutions of higher education in the South, opened its doors in 1848 and now enrolls more than 17,300 students on four campuses, including the Medical Center in Jackson. Ole Miss is a classical liberal arts institution that also offers a selection of quality professional programs. The main campus in Oxford, home of the late Nobel Prize-winning author William Faulkner, continues to be an incubator for writers and literary scholars. The Center for the Study of Southern Culture and the William Winter Institute for Racial Reconciliation are located on the Oxford campus, as are 30 other institutes and research centers. More than $100 million in research is conducted annually on the Oxford and Jackson campuses, where world-class studies in pharmacy, physical acoustics, and cardiovascular disease take place. The 1.2 million-volume library on the main campus houses the most extensive blues archive in the nation, Faulkner's papers, and the national library of the accountancy profession. Ranked among the nation's top 50 public research universities by the Lombardi Program on Measuring University Performance, the university emphasizes strong classroom teaching supported by excellent library, laboratory, and technical facilities. Its Sally McDonnell Barksdale Honors College has been ranked among the top three in the nation.

Located in Oxford

At the time of the FMEP: Director of Facilities Management, Terron Jones, Ian Banner, AIA, Director of Facilities Planning and University Architect

The *University of Southern Mississippi* is a national public university that is engaging and empowering individuals to transform lives and communities. Founded in 1910, Southern Miss is the only SREB-Level 1 designated university in the state graduating the most PhDs in-state. A dual-campus, Southern Miss boasts world-class research and teaching sites along the Gulf Coast; receives more than $102 million in research dollars; has signature academic programs including polymer science and engineering, the Center for Writers, the four-art disciplines, nursing and education; and has the sixth oldest Honors College in the nation. With academic excellence and, in a tradition of leadership for student development, Southern Miss is educating a 21st century workforce providing intellectual capital, cultural enrichment, and innovation to Mississippi and the world.

Located in Hattiesburg

Director of Physical Plant, Rusty Postlewate

THE BEST LEADERSHIP IS GOOD MANAGEMENT

It is a fact that the worst recession since the 1930s has caused the steepest decline in state tax receipts on record. As a result, even after making deep cuts, states continue to face large budget gaps. For the most part, as the state goes, so go the state institutions. For many state universities, the states have become an unreliable financial partner. No doubt a scenario like this has played out in many states where the recession reality has set in—the states have few options and this economic downturn will not end quickly.

In November 2009 the Center on Budget and Policy Priorities (CBPP), Washington D.C., reported the following:

- Mid-year shortfalls have opened up in 26 states totaling $16 billion or 4 percent of these budgets. These new shortfalls are in addition to the gaps states closed when adopting their fiscal year 2010 budgets earlier this year.
- Counting both initial and mid-year shortfalls, 48 states have addressed or still face such shortfalls in their budgets for fiscal year 2010, totaling $179 billion or 26 percent of state budgets — the largest gaps on record.
- Fiscal year 2011 gaps total $80 billion or 14 percent of budgets for the 35 states that have estimated the size of these gaps. These totals are likely to grow as revenues continue to deteriorate, and may well exceed $180 billion.

By the time of this publication the situation for many states has likely gotten worse.

Private institutions are also facing a tightening of budgets and financial resources, and institutional endowments from investments are suffering even as they are being counted on for operations. Contributions from benefactors are also diminished. Capital expenditures and more difficult debt financing have caused a rethinking and postponement of projects, programs, and plant priorities.

It just may be that the constraints caused by financial and budget realities for facilities managers is playing out as a management crisis manifesting itself in our own shortcomings associated with managing change.

Clearly the near-term, mid-term, and realistic foreseeable future provides substantial opportunities for facility managers faced with the daunting combination of ever-increasing costs of operations and diminished resources. The era of "doing more with less" has given way to "doing less with less." New meaning is being hoisted upon the phrase "close to the customer." More than ever we are learning to apply deliberate and disciplined processes to service level standards that emphasize real determination of the things that matter most to our customers on our college and university campuses.

It's truly time to change, an opportunity to step up and distinguish our facilities management profession, to become a leading organization on campus by improving organizational performance, and service effectiveness. It is also time to guard against taking the easy way out and to let our services slip into mediocrity.

We know from experience that every successful organizational change initiative begins with an organizational assessment. Without the knowledge gained from an assessment, we risk missing viable opportunities and can severely underestimate the resistance to changing the status quo. To ensure the overall future development and success of our facilities management organization, we would be wise to take a comprehensive collaborative approach to change like the State of Mississippi University facility managers did.

EVALUATING WITH THE FMEP

The APPA Facilities Management Evaluation Program (FMEP) provides a framework for this collaborative approach. Where we begin to change often depends on what our organization needs now and what we can discern from a careful diagnosis of the likely future conditions. Proper use of the FMEP allows facilities management organizations to attain collaboration among members within facilities management organization and across the campus; an opportunity to address internal challenge with the people who work inside the institution while at the same time we can gain the benefit of the thinking and experiences of facility management professional peers. *There has never been a better time for a second opinion.*

The FMEP Criteria:

- focus on performance excellence for the entire organization in an overall management framework.
- identify and help facility managers track all-important organizational results: leadership, strategic and operational planning and execution, customer service, financial, human resource and work environment, use of information technology, facility department service processes, and mission-critical organizational performance results. Together this framework provides a comprehensive and complementary picture of the facilities organization's readiness to do its job today and how it is positioned to be successful in the future.

Maybe you have heard about a struggling or failing facilities management organization that used an FMEP assessment to begin its turnaround. But why would a facilities management department with good performance in difficult financial times undertake an FMEP self-assessment and peer review site visit?

One reason is to become even better—and to get better results. In today's education environment of high-stakes administrative and academic accountability to wide-ranging stakeholders, achieving the fundamental and advanced organizational capabilities stressed in the FMEP criteria is absolutely essential.

Education leaders who understand performance excellence know that institutional accreditation practices and other forms of institutional *report-card-results* must show progress toward delivery of ever-improving value to students, faculty and staff, and community stakeholders. The seven comprehensive and complementary assessment categories of the FMEP criteria are designed to help administrative and academic officers and facility managers work together, to collaborate in capitalizing on an institution's unique strengths and will identify specific opportunities for improvement. When institutions effectively develop and deploy strategies in each of the Criteria Categories, they can expect to drive better results and to achieve better organizational effectiveness and service-process efficiencies that are relevant and that matter most in context with the specific needs of the institution.

The FMEP Criteria was not created in a vacuum but rather was developed by a group of seasoned and knowledgeable facility management professionals who are campus facility practitioners and also students and teachers of the FMEP and the APPA Award for Excellence (AFE) criteria; criteria patterned on the Malcolm Baldrige National Quality Award Program; and developed and updated annually by some of the best minds in the field and practice management and leadership today.

Jim Collins (author of *Good to Great: Why Some Companies Make the Leap … and Others Don't*) recently endorsed Baldrige as follows: "I see the Baldrige process as a powerful set of mechanisms for disciplined people engaged in disciplined thought and taking disciplined action to create great organizations that produce exceptional results." The FMEP brings discipline to the facilities management decision table.

A MESSAGE TO LEADERS

APPA asks,

- **Are you making progress?**
- **Are your values, vision, mission, and plans being deployed?**
- **Are they understood and supported by your leadership team?**
- **Are they understood and supported by all members of your workforce?**
- **Are your communications effective?**
- **Is the message being well received?**
- **Are you a high-performing, innovative organization?**
- **Is your organization achieving peer-class performance?**
- **Does your organization have clear strategic objectives that address your most important challenges?**
- **Are your customers satisfied with your products and services?**
- **Is your organization ethical and well governed? Is the facilities management work environment conducive to everyone performing at their utmost capability?**
- **Is the campus appearance the best it can be given the level of resources provided?**

It is time to step up to the line and take your best shot at continuing to improve the management of facility services; get over the fact that budget cuts and workload increases appear to be disproportionately directed at facilities management. Indeed, the best leadership in tough times may well be good management.

Jack Hug is a Past APPA President and currently is president of Hug Consulting Services of Colorado Springs, CO. He can be reached at *jackhug1@comcast.net*.

For more information on the **Facilities Management Evaluation Program** visit www.appa.org/fmep or contact Holly Jolliff at hjolliff@appa.org.

The Y Generation

They're Coming; Are We Ready?

by Darcy Loy

They were born between 1980 and 2001. They are perceived as being the "I'm entitled to..." the "What's in it for me?" generation—the "trophy kids." They have been exposed to technology from birth: e-mail, IM, the Web, cell phones, MySpace, Facebook, and text messaging. They are independent thinkers and have been raised to voice their ideas and opinions. They are "team" oriented; they should be, as organized play dates and extracurricular activities have been their norm.

They are the Gen Yers—the Millennial Generation and they are beginning to file through the doors of businesses across North America, bringing with them not only a new point of view and an entirely different set of expectations, but also challenges in regards to how they "fit" into our day-to-day operations. As facilities management leaders, are we ready for them?

Gen-Yers entering the workforce today are finding themselves working side-by-side with three other generations. Each group brings their own work ethic, expertise, and style to the table creating a challenge for facilities managers in regards to how we bring this varied palette together to form a cohesive and successful unit. The Gen-Yers are perceived by other generations as being a group of over-indulged, overprotected, and self-absorbed individuals who have a weak work ethic. They are viewed as wanting everything they believe they're entitled to without working their way up the corporate ladder, and they don't want to sacrifice their personal and family life for work. They expect hours that allows them time with family or to pursue their personal interests.

Kate Foster-Cheek, vice president for human resources at Johnson & Johnson, sums it perfectly, "For this generation, work is not a place you go; work is a thing you do." (Alsop 2008, p.2) As Derrick Bolton, assistant dean and M.B.A. admissions director at Stanford University's Business Graduate School, states, "They really do seem to want everything, and I can't decide if it's an inability or an unwillingness to make trade-offs." (Alsop 2008, p.1) Their Baby Boomer parents are to blame; they've given them everything since birth, and what is most ironic as stated by Joyce Grillo, "is that the Boomers who profess not to understand this new generation and are frustrated by their so-called demands are the very ones that helped shape them." (Grillo 2008, p.3)

Their tendency to rely on technology as their communication vessel leaves them lacking in interpersonal skills, and their Boomer bosses and coworkers see that as a serious problem.

ALWAYS A WINNER

The Gen Yers have been raised by "helicopter parents" who have indulged them with constant praise and positive reinforcement; the "never a loser, always a winner" parenting approach that helped nurture the "entitled to" attitude that some have. They come into the workplace leaving structured lifestyles where they have been showered with constant praise, that they in turn have a difficult time adapting to setting their own guidelines and are needy for attention and guidance from their leaders.

One of the biggest challenges employers are facing in regards to Gen-Yers entering the workforce is communication; or actually their inability to communicate on a personal level. This is the generation that has grown up socializing from a computer or cell phone via e-mail, instant messaging, and text messaging. Ken Groh, vice president for communications at Chicago-based Aon, states that, "The new generation is using these mediums as their version of the water-cooler chat. It's their electronic grapevine" (McIlvaine 2009, p.3). Their tendency to rely on technology as their communication vessel leaves them lacking in interpersonal skills, and their Boomer bosses and coworkers see that as a serious problem.

The Gen-Yers view technology in the workplace in an entirely different light than their baby boomer counterparts. In April 2009 LexisNexis released results of its Technology Gap Survey. The survey of 700 working professionals found significant differences in the way that these two generations perceive technology in the workplace. More than two-thirds of boomers agreed that PDAs contributed to a decline in proper workplace etiquette and believe the use of laptops during in-person meetings is "distracting." Fewer than one-half of Gen Y workers agreed. The younger generation is also far more comfortable discussing workplace-related topics online than boomers: Only 28 percent of boomers think blogging about work-related issues is acceptable, while 40 percent of Gen Yers do. (LexisNexis, 2009)

GEN-Y FOR FM?

So are you sitting there wondering why you as a facilities leader would want a somewhat self-centered individual, lacking in intrapersonal skills and needy of attention, with a whole different perspective on communication and work ethic as a member of your team? It's simple; we need them to assist us in the advancement of our departments as well as help us meet our needs of the future. With all education facing budget and staffing cuts, as well as an onslaught of soon-to-be retiring baby boomers in the workplace, we need the talents and attributes that this younger generation can bring to our units. They are creative and innovative and bring with them a skill set that will to help us persevere and excel in the difficult economic times that higher education is facing.

The Gen-Yers have spent a great deal of their lives being "overscheduled" individuals. Their parents have had them involved in a multitude of extra-curricular activities since birth, and it has forced this younger generation to become multi-task orientated; and they are good at it. Juggling

tasks and priorities is the day to day norm for us as facilities managers and we need employees that have the capability of assisting us so that our units can be as efficient and productive as possible in order to meet our goals and visions. This generation has spent a great deal of their free time in organized, group activities, as well as on sports teams and are more than familiar with the "team concept." They've grown up with the concept that to be successful as a team everyone has to assume and execute their specific role, thus they will probably do their best work in a team situation. These activities as young adults have also contributed to their ability to socialize easily.

They want to be liked by their coworkers and managers and they tend to be very loyal and committed to those they perceive as friends. They have been taught that it's okay to voice your opinion and idea, and they like to share their knowledge. They will be essential in arena of advancing technology. They've grown up with it; helped develop some of it; they are savvy at using it. Just look around you and you'll see how our facilities offices have evolved. We rely on laptops, wireless connections, and cell phones to keep us connected; PDAs to keep our days organized; the Internet for our research and connectivity to our colleagues across campus and the world. We deal with centralized irrigation systems, keyless entries, work-order management systems and computerized payroll on a daily basis. Technology is seen today as a critical component to the success of an organization and we need employees that help us keep up with current trends; the Gen-Yers can do that; it comes naturally to them.

Taking all of this insight in regards to the personality traits and skill sets of the Gen-Yers, how do we as facilities leaders successfully and effectively mainstream them into our organizations? For starters we need to "cross-mentor" these individuals; provide them the opportunity on a daily basis to learn from the "other generations" that they are working side-by-side with. If it is personal communication skills that they are lacking, we teach them through interactive training—how to deal with a customer on the telephone, why it's important to use complete sentences and proper grammar when drafting a report or sending an e-mail, why it's important to meet deadlines.

Facilities management is a customer service oriented business. We have daily face-to-face contact with our clients and our employees must be able to verbally communicate with them in an intelligent and courteous manner in order to meet their needs. We help them develop better conversational skills and we send them into the field with a mentor that can give them a firsthand look at how we operate. The Gen-Yers want

to learn and need strong mentors that are willing to give them honest feedback and encouragement. In turn, we learn from them; new concepts in regards to daily operations, communication, and technology. We share the vision and mission of our department and emphasize that they are key players in the success of reaching our goals.

THE NEW SKILL SET

The Gen-Yers bring numerous skill sets to the table and as facilities leaders we need to capitalize on what they have to offer. In order for our units to be successful we must go to our staff for new ideas and practices. No longer can we work under the practice that new ideas and concepts need to come from upper management. Our employees are the ones that are spending their days on the "front-line" and can share concepts that have the potential of working better or being more efficient. The Gen-Yers are not afraid to challenge what is perceived as being the normal; they like to ask "why?," which leads to revaluation of processes and a possible better and more efficient solution.

They are the social generation. They thrive on being "connected" and want honest communication from their leaders regardless if the message is good or bad. Gen-Yers want to be part of the process. Remember they have been raised to feel free to render their opinion; they want to contribute and will be more than willing to give feedback or share ideas. We do, however, need to mentor them in the proper process; you can't just go to the president or chancellor of the university with an idea; there is a procedure that needs to be followed. As leaders we are responsible for making them feel like a part of our team—that we value what they do and how they contribute. We acknowledge a job well done and when necessary we critique in a positive manner that is critical to their personal development. We *listen* to them, to their ideas, their concerns, and we follow through and relay information back to them.

They are the social generation. They thrive on being "connected" and want honest communication from their leaders regardless if the message is good or bad.

As leaders we need to utilize to our fullest potential the technological savvy of the Gen-Yers. Technology is critical to our success as we continue to move in the direction of more automated systems in our units. They allow us to be cost effective and more efficient and we need key employees that can help us stay on the cutting edge of technology. They've grown up with technology and participated in its creation. Who better to lead our units into the future then the Gen-Yers?

With emphasis in education on becoming more environmentally sound and sustainable, we need individuals in our units who can be stewards of this message; employees that can embrace the importance of the sustainable practices that are appearing, and are expected on our campuses today. The Gen-Yers passion for a greener world will make them strong advocates for our units as we looks for ways to make our campuses more sustainable.

As leaders we must embrace this new generation. Even with their little quirks they are intelligent, talented individuals that bring a fresh perspective to our workforce. It is our job as leaders in facilities management to perceive the potential they bring to the table and capitalize on their skill sets. We need them in order to succeed in fulfilling the mission and vision that each of us has for our units that will result in efficient and competitive organizations.

As Ronald Reagan once stated, "Each generation goes further than the generation preceding it because it stands on the shoulders of that generation. You will have opportunities beyond anything we've ever known." Prior generations have given us solid foundation to build on. It's time for this new generation—the Gen-Yers, the Millennials—to stand on the shoulders of those before them and take us to that place of endless opportunities.

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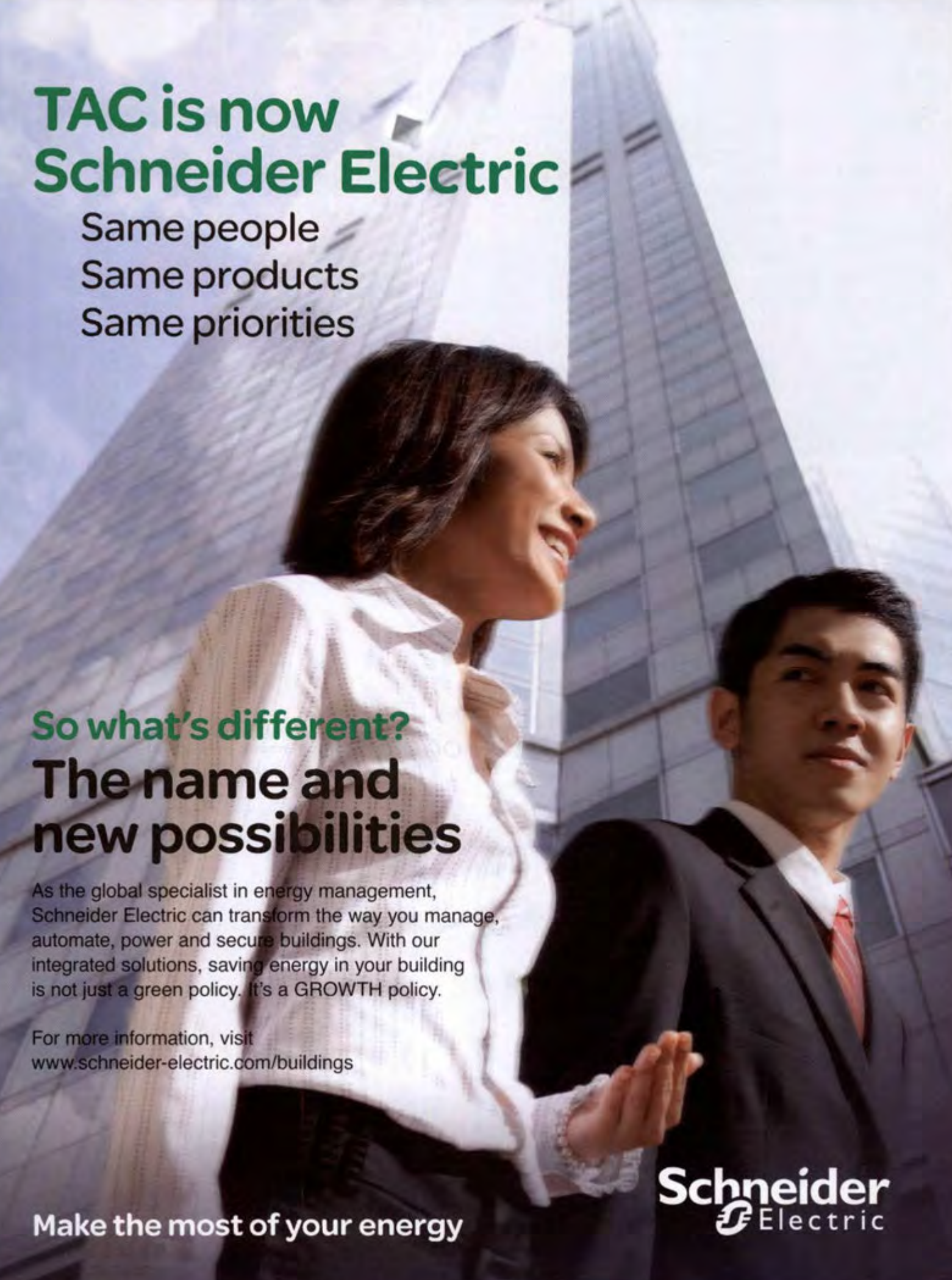
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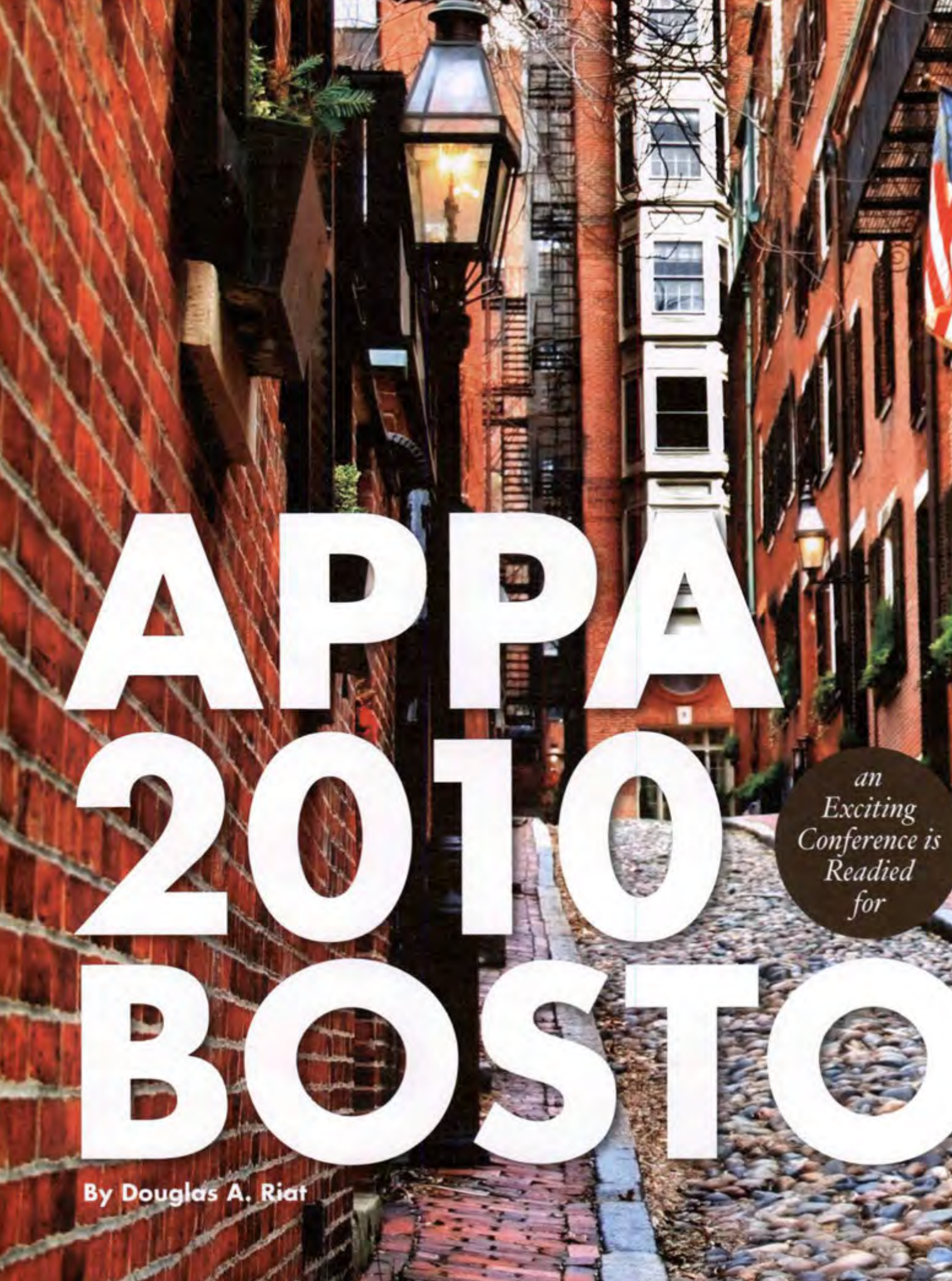

APPA 2010 BOSTO

an Exciting Conference is Readied for

By Douglas A. Riat

to register for APPA 2010, visit www.appa.org/training/appa2010.

At no time in recent memory have educational facilities professionals faced the challenges being experienced today. Likewise, APPA's role in developing facilities professionals into effective leaders and addressing key topics has never been more important in shaping our future. APPA's premier annual conference, APPA 2010 in Boston, Massachusetts, will focus on several key issues we face; the *economy*, *sustainability*, *energy*, *succession planning*, and *safety and security*. APPA 2010 will not only explore these important topics in detail, but the collaboration and interaction with peers makes this conference an unmatched value among the critical choices we make in the year ahead to better support the educational mission we serve.

Here's an advance look at what APPA 2010 will offer:

- An opportunity to become engaged and learn about the impact on higher education as endowments shrink and state tax support diminishes from a panel of educational experts answering audience questions.
- Get a 360-degree perspective of the importance of LEED, the impact and influence USGBC has on the movement to a greener environment and the facilities to support it.
- Look at "best practices" from throughout the educational community and from a "Czar" point of view regarding energy.
- Hear research findings regarding safety and security that will guide educational facilities and ideas about how best to plan. In addition, the importance of cohesive communication from the point of planning to execution for the safety of the campus environment will be explained.

Finally, invitations for a panel of experts from Virginia Tech, Northern Illinois University, and Columbine High School have been made to participate in a discussion on moving past tragedy.

In addition to an outstanding conference, the venue for APPA 2010 could not be better than the Seaport Hotel and World Trade Center. The first-class Seaport facilities are located right on the waterfront less than 10 minutes from Logan International Airport.

DESTINATION: BOSTON

The city of Boston is a great destination loaded with history. For instance, explore 16 nationally significant historical sites by catching the Freedom Trail tour just outside the hotel. Or, have fun shopping on Newbury Street, dining in Boston's North End, or visiting the nearby New England Aquarium, Institute of Contemporary Art, or the Children's Museum. Both conference attendees and spouse/guests will enjoy experiencing all of Boston's attractions and unique activities.

This year's conference will include professionals who represent K-12, community colleges, and public and private four-year institutions. As facilities professionals we share a common mission, and likewise we share similar challenges. In a difficult economic environment we all naturally make budget cuts and sacrifices, and we are asked to do "more with less." A difficult economic environment also results in uncertainty and changes that can be difficult to adjust to, because change takes us out of our normal comfort zone when a feeling of security is needed most.

REINVIGORATING SPEAKERS

The APPA 2010 conference speakers will address the critical issues and current trends, topics relative to our daily challenges as well as future planning. In addition to technical information, you will be "reinvigorated"—motivated to inspire others and instill a culture of positive change. Particularly in the current economic environment, our goal should not be solely to survive, but to tap and develop the full potential of our people in an effort to deliver our core services in a more efficient and effective manner. Another benefit of this conference is the interaction with peers, where we learn some of the most valuable ideas and proven strategies from our colleague's best practices and lessons learned. Finally, the APPA 2010 Hall of Resources provides a wealth of product and service information at our fingertips, experts interested in solving our most complex problems and developing lasting partnerships.

Good leaders and managers know that implementing change, achieving increased efficiencies, and maintaining a first-class service culture in this economic environment takes much more than simple phrases or good intentions. If you are looking for innovative concepts, proven strategies, and a better understanding of changing trends, APPA 2010 is the conference you can't afford to miss. More importantly, APPA 2010 will help you hone and develop strong leadership skills, essential to achieving goals and directing your organization successfully.

There are challenges ahead for all of us. As you balance the critical choices ahead, the opportunity to better understand current trends and potential solutions to today's challenges could not be timelier, or the need for strong and effective leadership development more important. So join us to hear experts and interact with colleagues. I believe you'll find the educational programming very informative and Boston a great destination, and I look forward to seeing you at APPA 2010.

Doug Riat is director of facilities operations at the University of Kansas, Lawrence, KS, and is the chair of the APPA 2010 programming committee. He can be reached at *driat@ku.edu*. This is his first article for *Facilities Manager*.

PERSPECTIVE

ON THE PROFESSION

Crossing the Border: A Venture into Regional Collaboration

By James Barbush

As a member of APPA's Eastern Region and my home KAPPA Chapter (K for Keystone State of Pennsylvania), I have attended many conferences in my chapter and region. I have also attended APPA's Annual Conferences, most notably the 2006 collaborative venture of APPA/NACUBO/SCUP in Hawaii with over 4,000 attendees, and APPA 2007 in Baltimore.

This past year I decided to venture out of my home territory and "cross the border" into another region. So I did a virtual tour of APPA's regions in the United States and Canada, and arrived at SRAPPA, a region adjacent to my own. I found SRAPPA's Call for Presentations for their 2009 Annual Meeting. Since I have presented at numerous conferences over the past five years, I decided to respond to SRAPPA's call. I contacted SRAPPA's Host Committee Chair, and spoke to Joni Brown of Embry-Riddle Aeronautical University. Joni enthusiastically requested that I submit my presentation, entitled "Sustaining Leadership through Difficult Times." The presentation was accepted and I was scheduled to attend SRAPPA 2009, their 58th Annual Meeting, *The Race To Green*, in Daytona Beach, Florida on October 3-6.

Never having been to another APPA region, I had no preconceived notions of what to expect. I was going to Florida to do a presentation, meet SRAPPA members, and take family along. I saw it as an opportunity to do something different. I had no notions of doing any particular business except attending educational sessions and doing the usual networking with business partners and facilities professionals.

As I explored this new territory, I began to see that this was going to be a significant event. At the opening reception, I immediately met and socialized with SRAPPA members and business partners. As the conference continued, and each event occurred, as education sessions and networking progressed, and as I met more SRAPPA members, APPA staff, and business partners, I saw how this trip to another region, with "unknown" expectations, was developing into a significant opportunity for additional collaboration between APPA, its regions, and its chapters. SRAPPA's incoming president, John Malmrose, greeted me with a relational response to my attendance. Lander Medlin, APPA's executive vice president, and Polly Pinney, APPA's President, commented that this visit to another region will stir thoughts of how to further develop regional collaboration in APPA.

After returning from the SRAPPA conference, I talked to several colleagues about what collaboration between APPA regions could be and what its results could be. I learned that PCAPPA and RMA collaborated on the 2007 Regional Conference, as well as on an earlier conference. They reported that "One goal of the combined PCAPPA/RMA conference was sharing experiences from our two regions. The many and diverse sessions achieved this goal admirably by mixing presenters from across the western states and Canada."

Through collaboration, APPA has greatly enhanced our organizations efforts, increased our strength, and further unified by the following collaborative efforts:

- APPA's organizational collaboration with related organizations. One example being the APPA/NACUBO/SCUP 2006 in Hawaii.
- APPA's ongoing collaboration with each region by communicating with regional boards and chapters and attending their conferences has been fruitful. Our regions have gained greatly and solved problems by communicating with APPA at our Board meetings. As a result, APPA representatives have come to better understand our regions and our chapters, and vice-versa.
- APPA's current collaborative effort with the Southern New England Chapter in the planning of APPA 2010 in Boston in July. As a local chapter and partner, SNEAPPA is assisting in providing first-rate education, entertainment, and an awards program.

Because of APPA's effective collaboration with regions, problems that we may once had are gone because of the communications in the relationships we have developed.

At this time, you might be asking some questions about this notion of regional collaboration. What is it? What does it consist of? What are its goals? What will it cost in time and money? What could a region gain or lose because of it? These are good questions. But many of us may not have specific answers for those questions. We may not have yet collaboratively considered the notion to sufficiently determine its goals, actions, costs, and fruits. The best answer I can give right now is this: "*Great things can happen when we are in relationship and collaborating. Not much happens outside of relationship and collaboration.*"

At ERAPPA 2009, attendees learned, as a result of the conference theme, "*imagine*," and as quoted by George Lucas, "*You can't do it unless you imagine it.*" Mirroring our theme, Monday's keynote speaker, Jeff Noel of the Disney Institute with 20 years of creative experience, presented an outstanding and inspirational keynote entitled *From Inspiration to Innovation*. Noel showed us how Walt Disney made dreams become reality, and therefore, assured us that we could imagine solutions and see our goals become reality in our facilities.

In closing, I offer these words: *Collaborative Independence*. That's a topic that I am thinking on and will continue to think on. To me, it means that we can build relationships, including those where people "cross the border" to another region in our organization or to another related organization. In those relationships we can collaborate to do small things (or big things) related to individual and corporate goals, and we can still remain independent in our operations.

It means that no central group dictates what is to be, that "related groups" do not need to look and act the same. It means that we can have individual identity within a larger corporate identity. It means that our collaborative relationships will further strengthen and unify our chapters, regions, and APPA, individually and corporately.

I'm sure we will be hearing APPA continue a dialogue on various forms of collaboration. I invite you to consider the collaboration of your region with another region. Think about what you could do and how you could do it. It may be as simple as a board member from one region calling a board member from another. I am sure that that would only be the beginning of what you can *imagine*.

Jim Barbush, ERAPPA's 2009-10 President, is facilities contracts manager at the Pennsylvania State System of Higher Education, Harrisburg, PA; he can be reached at *jbarbush@passhe.edu*.

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Virginia Graeme Baker Pool and Spa Safety Act

By Terri Konchesky, MS, and Nancy Key, MS, GSP

From 1999 through 2008 there were 83 reports of entrapments in pools and spas resulting in 69 injuries and 11 deaths from drowning and/or evisceration. Few people are aware of the dangers from drain suction outlets. Hair, limbs, jewelry, clothing, or the entire body can become entrapped by drain suction when suction outlets are not properly covered. This has led to drowning deaths and in some instances small children have been disemboweled by the force of the drain suction.

The Virginia Graeme Baker Pool and Spa Safety Act went into effect December of 2007. The law requires that anti-entrapment drain covers and other safety systems be installed in public pools and spas. Pool and spa operators were given one year to comply, so the enforcement period is already in effect.

The latest data from the U.S. Consumer Product Safety Commission (CPSC) shows that nearly 300 children ages 5 and younger drown in pools and spas each year, and about 3,000 suffer injuries that require emergency room visits or hospitalization. Many of these injuries result in permanent disability, including brain damage.

At a press conference on Capitol Hill, May 21, 2009, CPSC Acting Chairman Nancy Nord stated, "Preventing child drowning is a key part of CPSC's mission. I call upon all parties, caregivers, and pool and spa operators to ensure that fencing and other layers of protection are in place; that there is constant supervision of children in and around the water; and that the new, safer drain covers that prevent entrapment incidents are installed."

DRAIN COVER REQUIREMENTS

Under the Act, all public pools and spas must have ASME/ANSI A112.19.8-2007 compliant drain covers installed. Facilities operating with a single suction outlet must add an additional layer of protection. There are multiple options that include suction-limiting vent systems, safety vacuum release systems, gravity drain systems, automatic pump shut-offs, or other means to disable the drain.

Drain cover testing and certification is performed by Underwriters Laboratories, the National Sanitation Foundation, and the International Association of Plumbing and Mechanical Officials (IAPMO). CPSC has asked manufacturers to label the approved drain covers "VGB 2008." Drain covers made during the summer of 2008 may have the ASME symbol on them instead. Covers also display the usage (single or multiple), the flow rate in gallons per minute, the life in years, whether they are for use as a floor or wall mount, and the manufacturer's name and model number.

All drain covers have to be compliant to the ASME/ANSI A1 12.19.8-2007 standard. As of December 29, 2008, non-compliant drain covers may not be imported, manufactured, distributed, or sold in the United States. Some drain covers were custom made and may be of unique design. These covers and other existing drain covers may already be compliant. Current drain covers must be certified that they meet the standard by a Registered Design Professional or a licensed professional engineer or be replaced with compliant covers. It is recommended that residential pools also comply by replacing their old covers.

ADDITIONAL PROTECTION

Public pools and spas with single main drains must have a secondary layer of entrapment protection in addition to the compliant drain cover. There are several systems available that can meet this requirement:

- **A safety vacuum release system** will stop operation of the pump, reverse the circulation of flow, or otherwise provide a vacuum release when a blockage is detected. This type of system must be tested by an independent third party and found to conform to the ASME, ANSI, or ASTM standards.
- **Suction limiting vent systems**, also called atmospheric vents, allow air to be introduced into the suction line, which causes the pump to lose prime and relieve the suction force at the main drain. The ASTM International voluntary standards task group is in the process of developing minimum requirements for suction-limiting vent systems. Currently there are no approved voluntary standards; however, the design and function should be certified and inspected by a licensed inspector.
- **Automatic pump shut-off systems** sense blockages and automatically shut off the pump. Some safety vacuum release systems meet this definition. The National Electrical Code (NEC 680.40) requires an emergency shut off switch that is accessible to users, but not less than five feet from a public spa, however this is not an automatic system as required under the Virginia Graeme Baker Act. There are no current voluntary standards for automatic pump shut-off systems. The current safety vacuum release system standards (above) do specify response and release times.
- **Gravity pools**, also called reservoirs, surge tanks, or surge pits, have a

separate collection vessel that the pump draws water from for pool circulation. Water flows from the pool to the collection vessel by means of gravity. This relieves the need for suction at the pool level, so they are automatically considered to have a second anti-entrapment system. They must still be fitted with VGBA compliant covers. There are no current voluntary standards for gravity drainage systems or collection vessels.

- **Drain disablement** eliminates, rather than mitigates, the hazard of entrapment by physically removing a drain from the system. Turning the drain off doesn't count. The drain needs to be re-plumbed, the piping needs to be cut and capped in such a way that it cannot be reinstalled, or the sump needs to be filled with concrete.
- **Other systems** may be designed or developed that would prevent or eliminate the risk from pool drainage systems. Such systems would have to be presented to the Commission and approved. This portion of the act allows for the development of future products and designs.

ENFORCEMENT

The U.S. Consumer Product Safety Commission has focused enforcement priorities on public wading pools, pools designed specifically for small children, and in-ground spas. State Health Departments may assist the agency in enforcement, but this will vary from state to state. According to the CPSC, State Attorney Generals have been given the power to close down any pool or spa that fails to meet the requirements of the Act, but this is under dispute by some states. State and local laws may be passed that are stricter than the Act as long as they do not prevent pool owners and operators from complying with the Act.

The Act also includes provisions for grant funding to states, but funds have not been appropriated by the federal government to date. When available, these funds may be used to hire and train enforcement personnel and to educate pool owners, operators, and companies about the Act and about preventing drowning and entrapments.

MORE INFORMATION

CPSC launched the website *www.PoolSafety.gov* to provide information on regulations and drowning prevention.

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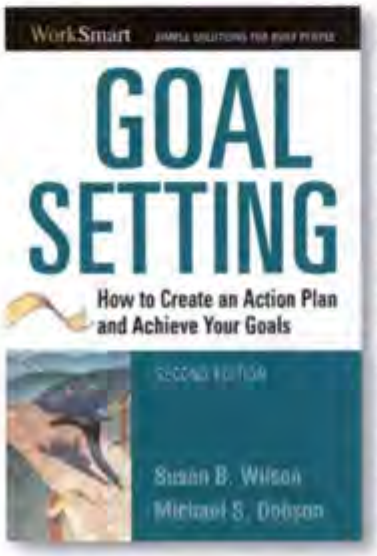
Book Review Editor: Theodore J. Weidner, Ph.D.

Rather than refer directly to this issue's theme, capital renewal and deferred maintenance, we'll look at tools that may help reach resolution of this important topic on your campus. Regardless, both books make for good reading just to start the New Year.

TW

GOAL SETTING – HOW TO CREATE AN ACTION PLAN AND ACHIEVE YOUR GOALS, SECOND EDITION

By Susan B. Wilson and Michael S. Dobson, AMACOM Books, New York, NY, 2008. Softcover, 114 pages, $12.00.



Timing is everything, including the amount of time needed to read a book that is meant for busy people. While anyone can use goals to achieve a desired end, the busy person uses specific goal setting techniques to arrive at an appropriate goal quickly and effectively.

In *Goal Setting*, Wilson and Dobson provide some clear lists to approach the development of goals, identify impediments to achieving goals, identify people who will help or hurt, and management of your time to achieve these goals. The lists are accompanied by mini-quizzes that reinforce the concepts with scenarios. There's plenty of space to make notes in the quizzes and to write your own goals in parallel with the examples.

In times of pressure to perform, *Goal Setting* clarifies techniques to resolve impediments to success through the same techniques that are needed to achieve goals. These include small steps with clear measures for success, and milestones to recognize what has been achieved before moving on to the next step. It seems trite, but that's how one makes progress. It's possible to jump into the book and identify solutions to impediments, both internal and external.

Because it is not a long book, the authors get to the point quickly. They don't pull punches either. Criteria for time management, negotiating with others to achieve goals, and addressing politics and power are addressed briefly. Additional information can be sought from other authors but this book's focus is a quick approach to the problem at hand.

Overall, if you've made a New Year's resolution but are having trouble getting started or continuing to make progress, this book will help. If you're coming up to an annual evaluation, this is a good source to address personal advance goals as well as identification of goals for subordinates.

LEAD YOUR BOSS - THE SUBTLE ART OF MANAGING UP

By John Baldoni, AMACOM Books, New York, NY 2010. Hardcover, 128 pages, $22.

It doesn't seem possible to tell your boss what to do, so *Lead Your Boss* is an unlikely title. However, in reality, those who achieve and advance do exactly that. It's a combination of thinking like your boss, working beyond normal responsibilities, accepting extra assignments and challenges, and demonstrating that you've thought through issues with consideration of others.

Similar to *Goal Setting*, *Lead Your Boss* uses a form of goals and objectives. Some of the needed traits include having the confidence to assemble smart people who will help create something new and valuable. Taking advantage of these people without being selfish or egotistical results in great things that get noticed.

Pushing the edges of the rules or knowledge is another way to develop new things and to get one's boss to make a desired change or provide a needed approval. That's not to say there aren't risks in working too far out in front; there are. These risks can be mitigated by working with others (peers, opponents, and subordinates.) Bosses don't like solving problems all the time; they want solutions proposed that have most of the snags worked out and addressed.

Lead Your Boss may be viewed as an application of the *Seven Habits* part of APPA's Leadership Academy. Thinking win-win, seeking to understand, listening to others, and similar techniques that continue to leverage the strengths of influence on others. It's the same thing taught by Dale Carnegie decades ago. These comments are not intended to diminish the value of this book; it's a valuable resource focused on a specific area that presents some standard techniques to accomplish a unique goal. However, the techniques described can be applied in other situations with success.

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Compiled by Gerry Van Treeck

Southworth Products Dura-Dock™ Series loading-dock lifts transfer loads quickly and safely from any truck bed to any dock height, and vice versa, without ramps or inclines. Available in 5,000 lbs. and 6,000 lbs. capacities, Dura-Dock lifts feature corrosion-resistant, galvanized base and legs as standard. For higher capacities (up to 20,000 lbs.) galvanized construction is optional. All Southworth dock lifts work from grade level to a maximum height of 59 inches. For more information visit Southworth Products at *www.SouthworthProducts.com*.

Palmgren has double band miter saws. The general purpose cut-off saws are equipped with a swiveling saw head that moves both right and left while keeping the work piece in one position during miter cuts. A built-in protractor allows for fast, accurate angle selection. The saws are ideally suited for jobs that require from one to many accurate angle cuts. The #83308 has a round 8-inch round cutting capacity and the #83310 has a 10-inch capacity and also comes with an optional coolant system, #82209. Both models offer a wide selection of standard features designed to provide maximum performance, accuracy and economical operation. For greater detail visit Palmgren at *www.palmgren.com*.

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