

Shifting Goal

Managing

By Mark Crawford



S, Expectations

Disruptive change is coming to educational facilities management. Administration has increasing demands and expectations for staying current and improving both operational and student performance, with fewer resources. Demographics and student preferences are rapidly changing. Is informational technology adequate or obsolete? Are facilities and campus infrastructure modern enough, and flexible enough, to be readily adapted as goals evolve? What are enrollment trends, and how will they impact facilities management in the future? With the huge pressure to control costs, the last thing colleges and universities want to do is update or build facilities that will later be underutilized.

Administrative goals can create a pile-up of expectations, including:

- Unlimited desires for flexible space that can be adapted quickly to accommodate multiple, diverse purposes
- Technology-enabled space that can simultaneously accommodate both traditional live, in-person pedagogy and distance-enabled education
- Improved energy efficiency and carbon neutrality, in many cases driven by responses to student interests
- Keeping up with and matching peer institutions' capital investments, especially for research capacity

And, perhaps the greatest expectation of all (and the most challenging) is achieving all these goals while reducing operational costs and avoiding or deferring capital investments.

"The demand to reduce the cost of education, the age and condition of physical plants, opportunities to learn online, and diminished state and federal financial support all impact goals as they relate to facilities," says **Gregory Scott**, assistant vice president for finance and business for Penn State University at University Park, Pennsylvania. "It's especially hard to manage facility-related expectations because facilities have such a long development and life. Facility-related decisions are long-lasting and difficult to change rapidly."

"The title of this article really describes the career of every facilities professional in the education environment," adds **Mary Vosevich**, vice president for facilities management at the University of Kentucky in Lexington. "We deal with the changing delivery methods of education and what that means for the built environment, while we are managing facilities that are aging along with our workforce. Coupled with that are university administration expectations of doing better with less. I think change is the one constant! Therefore we need to be flexible, stay current, and have well-trained staff that is actively involved in managing the expectations."

DRIVERS OF CHANGE

Goals and expectations typically revolve around the top stressors that affect performance and financial performance. An institution's campus and facilities portfolio are usually the largest capital investments a college or university is required to support. The facilities management department needs to be able to manage these physical assets both efficiently and effectively for the institution to be successful. Top stressors that prompt strategic planning and goal-setting are:

- **Technology.** The biggest issues regarding IT are being up to date and adequate. Do facilities have the latest information technology and energy technology that can be deployed readily and easily to enhance pedagogy and save operational expenses?

This can be a big challenge—for example, more instruction is moving to the Internet. "Large lecture halls are no longer in high demand," says **Duane Hickling**, managing principal for Hickling & Associates LLC in Chicago, Illinois. "Even though it is less expensive for instruction to be delivered over the Internet, higher education is challenged in trying to repurpose and rightsize the facilities portfolio to adapt to this new environment."

Another aspect of technology relates to faster communications and how work gets done. "In the past, the trades folks just did the work, they didn't have to worry about telling the story,"

This photo was taken by Col. Duane Lamb, Assistant Vice President, Facilities & Grounds, at The University of Alabama. The photo depicts Foster Auditorium and the Malone Hood Plaza on the UA campus.



says **David Button**, vice president, administration, at the University of Regina in Regina, Saskatchewan. “Nowadays, I find that people and business are far more difficult to satisfy. Indeed, customers are watching so carefully, not so much to see results, but sometimes to see if they can find a flaw in the process. The advent of social media means that before the facilities staff even hears about the problem, the customer has already identified the issue, developed solutions, and created a firestorm of opinions—rightly or wrongly. Responding to all that takes as much effort as undertaking the technical fix.”

- *Stranded assets.* When facilities lose value because of unexpected or premature economic shifts, they are considered “stranded” in that they are not serving their original purpose and likely creating a negative income stream. “The first big challenge is facilities that are no longer needed because pedagogy has changed and they are either are superfluous or are not flexible enough to be updated,” says **George Pernsteiner**, president of the State Higher Education Executive Officers Association in Boulder, Colorado. “The second is that enrollment at some colleges is shrinking and may continue to do so, making facilities unneeded.”

A number of campuses are over-built, thanks to relatively low interest rates that have continued for an extended period of time. This has made it easy for campuses to bond for and construct new buildings. “It is estimated that higher education may be overbuilt by as much as 50 percent,” says Hickling. “If a campus has excess space, it means there are increased O&M expenses such as utilities, cleaning, repairs, and preventive maintenance that must be addressed annually.”



Gregory Scott

Deferred maintenance. The backlog of deferred maintenance at most educational institutions is so large that managing it effectively with constrained resources may not be realistic—resulting in facilities that do not fully serve the needs of students, are unattractive, and possibly be even unsafe or unsound. “Service expectation levels continue to rise as we seek to become as efficient as possible,” says **Polly Pinney**, executive director of facilities management for Arizona State University in Tempe. “Our aging infrastructure and lack of funding for basic maintenance and deferred maintenance continues to stretch our resources and complicate the execution of services.”

- *Shifting demographics.* Fewer students are enrolling in American higher education, increasing financial strain on tuition-driven institutions. Excess classroom space and empty residence halls quickly become a liability. “There is less income to support them, but the facilities costs of supporting the

brick-and-mortar campus do not necessarily decrease very much,” says Hickling.



Duane Hickling

- *Greater diversity.* In the coming years the student demographic will continue to change, reflecting a wider range of ages. More students will be coming from low-income backgrounds and communities of color. In general, a greater proportion of incoming students will also have a deeper knowledge of technology that exceeds the previous generation of students.

“The net result is that lower cost is becoming more imperative than ever—leading perhaps to facilities being used in different ways, or more intensively,” says Pernsteiner. “Technology could even lead to fewer facilities, but it will be a tool that can reach students who cannot come to campus, or who cannot afford to do so.”

FOCUSING EXPECTATIONS

Although these stressors may not immediately impact the FM department, they can change the financial business model of the institution and require the campus costs

be controlled while the adaptation occurs—resulting in shifting goals and changing expectations. The best way to manage these is by having a well-conceived, carefully considered management plan that is aligned with the institution’s mission and includes an awareness of how to deal with future contingencies.



Mary Vosevich

Working with multiple educational institutions over the years, Hickling has noticed that many FM departments have sharpened their focus on achieving greater value from the resources committed to sustaining the campus. “The most effective FM programs are those that have accurately aligned the goals and objectives of the department with the institution,” he says. “This can include containing costs, improving services, improving facility reliability, or improving campus attractiveness.”

For example, Arizona State University has grown exponentially to become one of the largest institutions of higher education in the U.S. Its goals include demonstrating American leadership in academic excellence and accessibility, establishing national standing in academic quality, and becoming a global center for interdisciplinary research, discovery, and development by 2020. “We have expanded with additional external campuses, added large amounts of new construction, and significantly increased our research effort, all while our campus populations continue to increase,” says Pinney.



Although the goals at the University of Kentucky have not changed significantly in recent years, there has been an increased focus on delivering excellence—especially for the student experience. “Now, more than ever before, our goals are more student-centered and focused on their quality of life,” says Vosevich. “Where are our students living? Where are they collaborating with each other and their faculty? What is the classroom experience? Where do they recreate? All the facilities where this is happening should be state-of-the-art and deliver the resources the students need to succeed.”

Scott indicates that at Penn State University, with a new president in office, the focus of the institutional direction has sharpened. “We are focused on excellence, student engagement, diversity and demographics, access and affordability, student career success, and technology,” says Scott. “These are not that different from our previous mission, but they are more defined and forward focused.”

In a dynamic environment, change can come quickly. Fast shifts—although exciting—can be difficult to man-

age. Some institutions simply are not nimble enough to make the changes happen quickly, both structurally and culturally. But a college or university also doesn’t want to become too complacent and set in its ways—because, in this environment, reacting to change is a “given” in order to survive.

“Fast shifts can be good and bad,” Scott adds. “Penn State tends to be an institution that is very measured in managing change. But being too conservative can also lead to missed opportunities, so there is a need for balance.”

Institutions that handle change well tend to look forward and play through “what if” scenarios that are important for creating a wider awareness of the factors that impact facilities management. In the best cases, this creates a mindset of thinking ahead so that when the surprises happen, they aren’t really surprises and the institution knows how to respond (expectations already in place).

“The effective institutions are the ones that recognize the susceptibility to external pressures that could upset established plans,” states **Larry Goldstein**, president of Campus Strategies LLC in Crimora, Virginia. “These institutions incorporate contingencies in their plans to enable to them to shift gears relatively more



David Button



George Pernsteiner

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easily than those that fail to acknowledge the limitations of their control. Donors, sponsors, and regulators can cause institutions to change direction in ways that make sense but were not contemplated. When that happens, it helps immensely if the institution has approached efforts with the ability to shift to go in other directions, with only minimal warning or time lost to engage in planning that could have been done earlier.”



Polly Pinney



Larry Goldstein

shifting needs and expectations. Increased pressure on resources will continue. Dramatic workforce shifts necessitated by looming retirements both at management and staff levels within facilities operations will also have to be managed.

“Another top challenge will be labor force,” says Vosevich. “I believe that we will be training the next skilled trades groups. We are going to have to grow our own and do what we can to retain them. The ever-present challenge is to do better with less. This speaks to the absolute necessity that we have the best-trained labor pool possible and that they understand the goals and mission of the institution.”

In general, the most successful facilities professionals engage in “what if” analyses to develop alternative approaches that will serve them and the institution if goals or expectations begin to change. “Combined with enhanced communication, they can position themselves for optimal effectiveness in the dynamic environments in which they find themselves,” says Goldstein.

At times facilities professionals can be too close to the process to be truly objective. It can be useful to bring in consultants to help develop the process for achieving goals and managing results and expectations. The best consultants are those who can enhance efforts on campus, rather than simply provide answers. They can facilitate discoveries that emerge from within the existing knowledge that are highly beneficial in building institutional capacity.

“Sometimes outside eyes and minds can be a great help in allowing us to move forward from the past and welcome and embrace the future,” says Pinney. “APPA is an excellent resource for keeping up with trends, and a colleague is only a phone call or e-mail away. I don’t think any of us are capable of accurately predicting the future, but we can certainly stay on top of trends in the business and new ideas and products to help us prepare.”

Ultimately, facilities management leaders must look carefully at their mission, purpose, environment, and resources to make the best decisions. “They need to know who are they, who they serve, who the competition is, and what their comparative strengths and advantages are,” says Pernsteiner. “Taking a hard-eyed look at these things requires an honesty that consultants may be better equipped to facilitate than internal players. However, leadership is still required—for example, board, presidential, faculty, and community—and the engagement of all important stakeholders is imperative.”

Mark Crawford is a freelance writer based in Madison, WI; he can be reached at mark.crawford@charter.net.

MANAGING THE FUTURE

Major forces will continue to converge on facilities management—these include new technical equipment and maintenance needs, increased enrollment requiring new or improved space and density needs, and balancing increased online presence with facilities needed to support this trend toward online education. Shifting demographics among students and employees will lead to

PARTING WORDS OF WISDOM

“Be true to your mission and know your own market. If that market is changing, or if your mission is evolving, be mindful of who you serve and what they need, want and expect. —George Pernsteiner

“Keep an open mind and be willing to model out-of-box thought. Always keep your eye on the dichotomy between expectation and reality in relation to communications with your campus leadership.”
—Polly Pinney

“Stay true to the mission and vision set by senior administration. Make sure you understand where the institution is heading and be supportive. Stay grounded in good sound business decisions and best practices. Be careful not to chase every ‘flavor of the day’ idea.”
—Gregory Scott

“Communicate and be sure staff understand the important role each of them plays in the mission of the institution. They are not just custodians, or groundskeepers, or electricians—they are people making a difference every day.” —Mary Vosevich

“Be adaptable. Identify performance metrics to measure the organization’s response capabilities and the performance of the FM portfolio. FM leaders should not immediately assume the institution is able to divert increased funds or resources to maintaining the facilities portfolio.”
—Duane Hickling

“Work smarter, not harder. There is a tendency in higher education to be consumed by meetings. It would be more effective to carve time out to be reflective and think about the future, rather than waiting to be run over by it.” —Larry Goldstein