

GETTING THE MOST OUT OF APPA'S FPI SURVEY & REPORT TOOL AND A PREVIEW OF WHAT'S TO COME

APPA/PCAPPA/BAY APPA 2017 ANNUAL MEETING

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AGENDA

- ☐ Having a meaningful conversation with campus leadership about facilities
- ☐ What questions are being asked?
- ☐ What data is needed?
- ☐ How will we maintain data integrity?
- ☐ Leveraging other data sources for FPI
- ☐ Facility Informatics – Data Forward!!!
- ☐ What's Next for the FPI
- ☐ Examples



MEANINGFUL CONVERSATION

KEY QUESTIONS

1. Are your facilities metrics aligned with your institution?
What are the performance measures necessary to support the success of your institution?
2. Are the institutional metrics aligned with the future directions of higher education?
Will the future be anything like the past?



INSTITUTIONAL ACTIVITY MANAGEMENT

- ☐ Financial Endowment
- ☐ Academic Mission
- ☐ Student applications/acceptances/attendance/retention
- ☐ Real Estate Portfolio Management



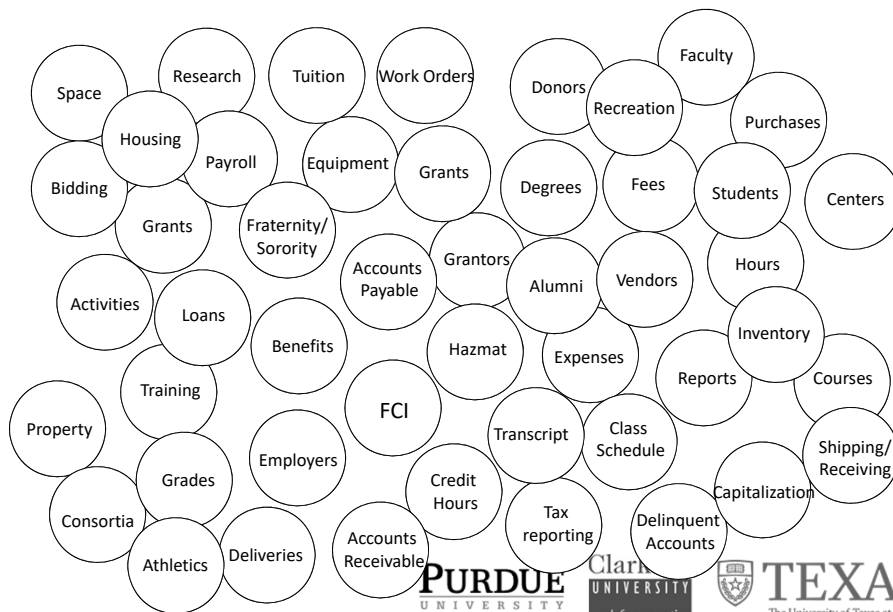
WHAT QUESTIONS ARE BEING ASKED?

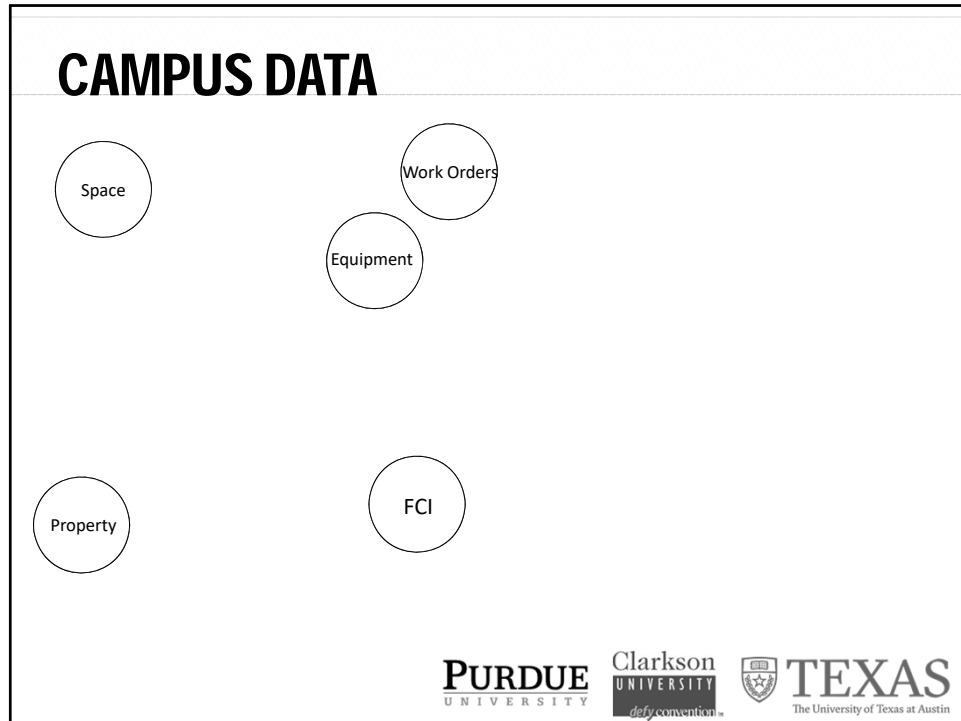
VALUE PROPOSITION

1. Overhead costs are too high
2. Substandard classes and teachers
3. Increasingly visible rating system
4. Inconvenience of time and place
5. Pricing competition
6. Credentialing system competition
7. Relationships formed in colleges replaced by other systems and avenues
8. Loss of trust; realize other avenues can provide knowledge and competency






INSTITUTIONAL DATA





CAMPUS DATA

Space	Classroom, Laboratory, Office, Study, Special, General, Support, Clinic, Residential	NCES - FICM
Equipment	Desks, chairs, tools, machinery, vehicles	
Work Orders	Maintenance records: preventive, reactive, corrective; historical data	CMMS
FCI	Condition assessment, operational performance	
Property	Buildings & real estate, capital projects	

PERFORMANCE MEASUREMENT EVOLUTION

1. First Generation

Question:

Are we spending enough on our facilities portfolio?

Measures Considered:

Cost comparisons against averages and benchmarks



PERFORMANCE MEASUREMENT EVOLUTION

2. Second Generation

Question:

Are we getting full value from the resources committed to sustaining our facilities portfolio?

Measures Considered:

Comparisons against identified best practices;
Lean management process analysis



PERFORMANCE MEASUREMENT EVOLUTION

3. Third Generation

Question:

Is our institutional portfolio appropriate for the delivery of the mission?

Measures Considered:

Intensity of space usage; technology analysis



DATA INTEGRITY

FOCUS ON THE KNOWN

FPI questions

Full survey 450 (*seems like 1,000's of questions*)

Express survey 102 (*still a lot of questions*)



FOCUS ON WHAT IS IMPORTANT



From the facilities organization

- ☐ AFOE – Annual Facility Operating Expenditure
- ☐ CRV – Current Replacement Value
- ☐ GSF-GSM – Gross Square Feet or Gross Square Meters
- ☐ PU – Purchased Utilities
- ☐ MMBtu – Thousands of British Thermal Units
- ☐ Aux – Auxiliary facilities (Y/N, include/don't)

From others

GIE – Gross Institutional Expenditure
SFTE – Student Full Time Equivalent

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LEVERAGING DATA SOURCES

Colleges and university report lots of data to the government on a regular schedule:

IPEDS – Integrated Post-secondary Education Data System

Your primary source for information on U.S. colleges, universities, and technical and vocational institutions.

SERF – NSF Science & Engineering Research Facilities

... data on the amount, construction, repair/renovation and funding of science and engineering research facilities ...

IRS Form 990 – “Return of Organization Exempt From Income Tax”

Tax-exempt organizations, nonexempt charitable trusts, and section 527 political organizations file this form to provide the IRS with the information required by section 6033.

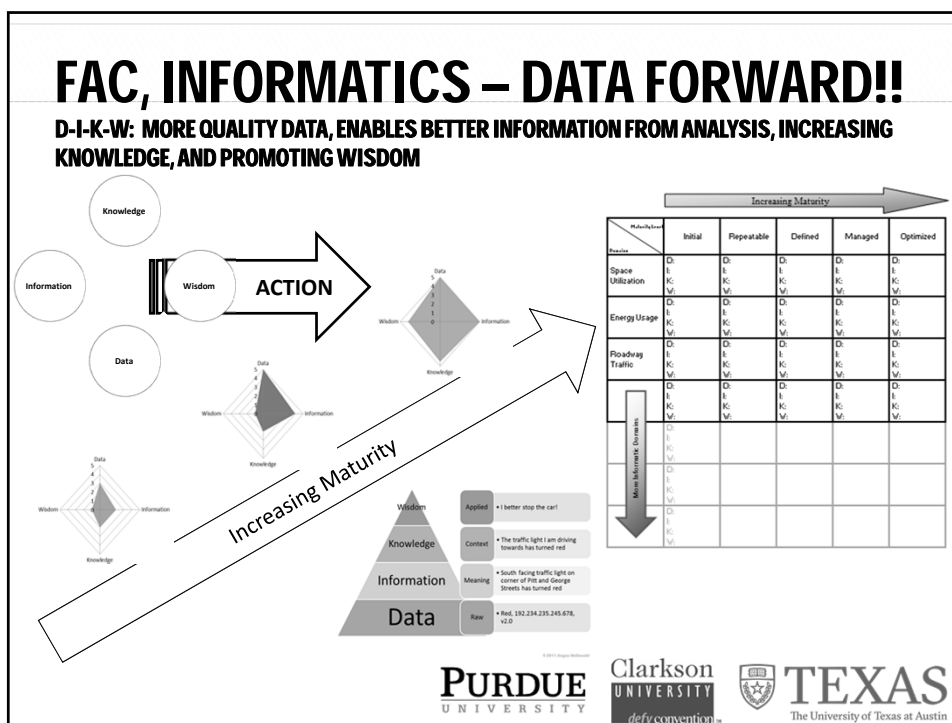
Others

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WHAT'S NEXT FOR THE FPI

CONCEPTS AND RESULTS FROM THE FACILITY INFORMATICS WORKING GROUP

“Auto Upload” – The Future FPI will enable the selection or “auto upload” of existing, publically available, data sources: IPEDS, SERF, Carnegie Classification

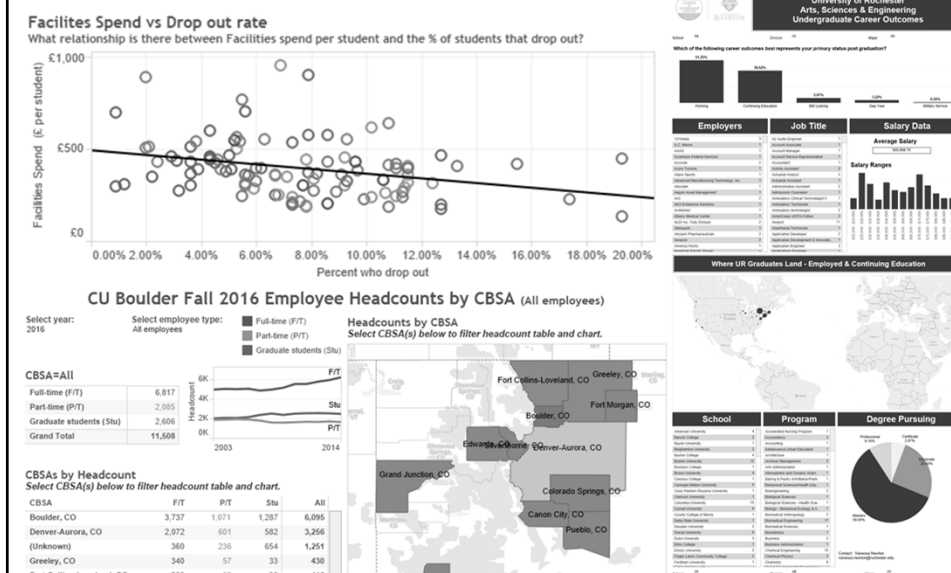
Better Dashboards and Visualizations – Enabling you to use the FPI to see year over year change, and speak with authority to your CFO/CBO.

Facilities Performance Indicators (FPI) Top Metrics Dashboard

Metric	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Annual Facility Oper. Expenses (AFOE)/Current Replacement Value (CRV)	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
AFOE/Gross Institutional Expenditures (GIE)	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
AFOE/Gross Square Foot (GSF)	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
AFOE/Student Full Time Equivalent (SFTE)	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
Purchased Utilities (PU)/GSF	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
PU/SFTE	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
Btu/GSF w/ Auxiliaries (Aux) Included	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
Btu/GSF w/o Aux	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%
MMBtu/SFTE	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%

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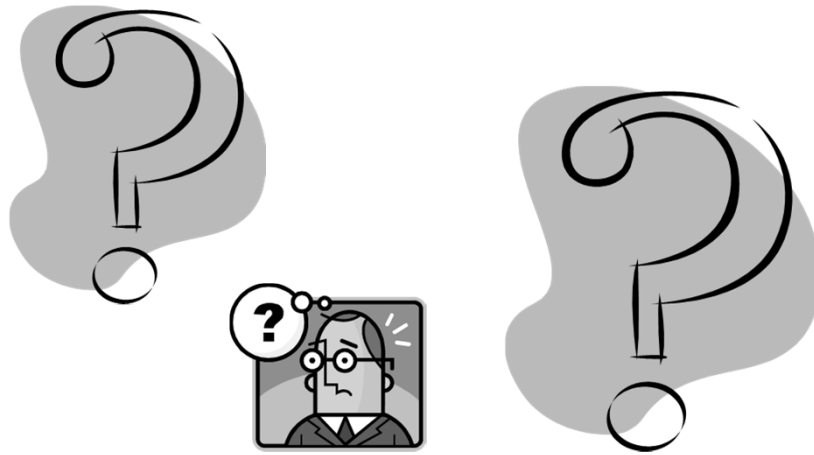
EXAMPLES - VISUALIZATIONS



Does the idea of a need for “Facilities Informatics” resonate with you/your organization?

How so?

QUESTIONS - DISCUSSION



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