

Assess

PROFESSIONAL
DEVELOPMENT

through

Organizational
Assessment

Evaluate

Manage

Measure

Using APPA's Facilities Management Evaluation Program

By E. Lander Medlin and R. Holly Judd

The facilities management profession has become more complex than ever before, and the challenges of meeting, and exceeding, customer demands 24/7 seem daunting at times. We are living in an environment of increasingly, if not rapidly, diminishing resources that will require our best efforts to do our work as efficiently and effectively as possible. We need to not only do things right, but consistently and predictably do the right things.

The problems surrounding our institutions and the facilities organizations themselves are mounting, and we must be part of the solution. This will require increased levels of productivity and accountability that are in alignment with the institution's vision, mission, and strategy.

APPA's Facilities Management Evaluation Program (FMEP) provides an integrated system to optimize organizational performance. The criteria for evaluation not only provide a tool for organizational continuous improvement, they serve as a compelling leadership development tool essential for today's facilities management professional. Since the first beta evaluation was conducted in 1989, more than 110 institutions have taken advantage of APPA's evaluation service—an average of more than five per year.

The senior facilities officer can utilize this well-designed set of performance criteria, measures, and metrics to establish a pathway for staff development and organizational continuous improvement whether formally delivered or informally applied. Utilizing the FMEP throughout the organization helps the SFO engage their staff in professional development opportunities necessary to their growth and development by virtue of their engagement in the process and seeking the desired outcomes to achieve overall success.

WHY CONSIDER THE FMEP?

The Facilities Management Evaluation Program is a highly customized, personally tailored evaluation process that can help facilities professionals assess their organizations' current performance levels and provide practical ideas and strategies to plan for improvement. With the right amount of staff participation and involvement, the process can garner the buy-in necessary to implement long-lasting, comprehensive change.

Institutions conduct FMEPs for many reasons. Some feel the need to establish performance benchmarks, others have a desire for a performance "check-up," and still others are preparing for an external accreditation review or a formal internal administrative departmental review. Regardless of the reason, a comprehensive facilities review can help ensure high-quality performance and customer satisfaction.

WHO CONDUCTS THE FMEP?

Undergoing a formal facilities evaluation is much like going in for an annual physical examination: it's important for overall health and well-being, but there's always the fear that something unpleasant will be discovered. This is why people seek the most competent, thorough, and professional medical care possible. Likewise, the individuals entrusted to evaluate an institution's facilities operations should be respected and knowledgeable in the field of educational facilities management.

For this reason, the FMEP uses a peer-review approach. Evaluation team members are seasoned educational facilities professionals who understand the practice of facilities management within the education environment. Each team is specifically tailored to align with the features and circumstances of the institution requesting the FMEP. This high level of customization helps ensure a thorough, balanced review in a short amount of time. FMEP evaluators quickly focus on the real issues—quality and effectiveness.

IS THE FMEP RIGHT FOR MY INSTITUTION?

Whether an institution is seeking a baseline assessment, measuring the results of a well-established continuous improvement program, undergoing an administrative review, or concerned about institutional accreditation, the FMEP can assist. Every FMEP is designed to:

- Provide an evaluation team tailored to the specific needs of the institution.
- Focus on the most important, cogent issues in a short period of time (usually between three and five days).
- Assess facilities operations performance in relation to the institutional and departmental mission, goals, and standards.

- Obtain conclusions based on factual data.
- Enhance the continuous improvement process.
- Assist in developing a planning tool for strategic and long-range purposes.
 - Strengthen the institution's ability to serve its customers' needs.
 - Emphasize department staff participation to create support for and commitment to long-term change.

- Develop a menu of realistic, practical recommendations for improvement.
 - Improve the understanding of facilities management issues within the department and throughout the institution.

In a few cases, we have undertaken a "system-wide" evaluation whereby all institutions in the system conducted an individual FMEP *and* the system office received an overall assessment for their collective institutions.

Institutions Completing the FMEP

Acadia University	Hong Kong University of Science and Technology	Shepherd University	
Alcorn State University	Jackson State University	Smithsonian Institution***	
Appalachian State University	Louisiana State University	Southern Illinois University	
Arizona State University	Medical Center	Edwardsville	
Arkansas State University	Maryland Institute College of Art	Southern Oregon University	
Baylor University	McGill University	St. Mary's College Maryland	
Bridgewater State College	McMaster University	Tennessee State University	
Brigham Young University***	Medical College of Wisconsin	Texas Tech University***	
Brookhaven National Laboratory	Medical University of South Carolina**	Towson University	
Calgary Board of Education	Memorial University of Newfoundland	Trent University	
California State University Monterey Bay	Millersville University	University of Mississippi	
Carleton University	Mississippi University for Women	Medical Center	
Central Michigan University	Mississippi Valley State University	University of Virginia**	
City College of the City University of New York	Montclair State College***	University of Alabama	
Colorado College***	Mount Allison University	Birmingham***	
Community College of Philadelphia	National Gallery of Art	University of Arizona*	
Cornell University	Northern Arizona University	University of Arkansas Fayetteville	
Dalhousie University	Northfield Mount Hermon School	University of British Columbia	
Delta State University	Ohio Agricultural Research and Development Center	University of California	
DePauw University	Ohio State University Mansfield	Santa Barbara	
Eastern Illinois University	Ohio State University Wooster	University of Dayton	
Elmhurst College	Ohio University	University of Guelph	
Emory University***	Oregon State University	University of Hawaii Manoa**	
Evergreen State College	Pepperdine University	University of Idaho Moscow	
Gallaudet University	Philadelphia University***	University of Illinois	
Georgia State University***	Portland State University	Urbana-Champaign	
Georgia Tech Housing	Providence College	University of Maryland Baltimore	
Grand View University	Purdue University**	University of Massachusetts	
Grinnell College	Queens University	Amherst	
Guilford College	Roberts Wesleyan College	University of Massachusetts Lowell	
Harrisburg Area Community College***	Saint Cloud State University	University of Michigan Housing***	
Hobart and William Smith Colleges	Savannah River Ecology Laboratory	University of Mississippi	
		University of Missouri Columbia	
		University of Montana	
		University of New Brunswick	
		University of North Carolina Wilmington	
		University of North Florida***	
		University of Prince Edward Island	
		University of South Carolina	
		University of South Florida	
		University of Southern Maine	
		University of Southern Mississippi	
		University of Texas at San Antonio**	
		University of Texas Austin**	
		University of Texas M.D. Anderson Cancer Center	
		University of Texas San Antonio	
		University of Toledo***	
		University of Virginia**	
		University of Washington Tacoma	
		Weber State University	
		Western Washington University	
		Whitworth College	

* In 1989, the University of Arizona was the beta site for the first FMEP evaluation.

** Indicates institutions that have completed the FMEP more than once.

*** Institutions that later applied for and received APPA's Award for Excellence in Facilities Management.

For more information on the Award for Excellence, visit www.appa.org/recognition/awardsforexcellence.cfm



WHAT IS THE RELATIONSHIP BETWEEN THE FMEP AND APPA'S AWARD FOR EXCELLENCE?

The Award for Excellence (AFE), APPA's highest institutional award, provides educational institutions the opportunity for national and international recognition for their outstanding achievements in facilities management. APPA's Professional Affairs Committee judges AFE nominations using the same criteria used in FMEP evaluations.

Therefore, those institutions conducting an FMEP can see where they might improve or if indeed their institutions are worthy of application for the AFE. In fact in the past 20 years, 12 of the AFE winners participated in the FMEP prior to applying for the award. For more information on the AFE, visit www.appa.org/recognition/awardsforexcellence.cfm.

HOW DOES THE PROCESS WORK?

The FMEP process can take approximately 12 to 16 weeks or longer from "initiation through site visit." Institutions work closely with APPA staff and the FMEP team leader throughout the process to determine a schedule based on the needs of the institution.

THE SELF-EVALUATION

The evaluation process is most effective when an institution

has a clear understanding of its own needs. For this reason, the first step in the FMEP is a comprehensive institutional self-evaluation. This process of self-discovery reveals areas for further investigation. The self-evaluation addresses the same criteria that will be used later by the evaluation team. The criteria can be found on the next page.

THE SITE VISIT

The site visit provides an opportunity to clarify issues in the self-evaluation and talk firsthand to staff and constituencies throughout the organization. Outside evaluators can often draw out information that personnel may be hesitant to express to co-workers and supervisors.

An institutional representative should be available to guide the evaluation team and answer its inquiries. The FMEP team leader will work with the institutional representative to determine interview schedules and clarify aspects of the self-evaluation.

THE FMEP REPORT

At the conclusion of the visit, the team leader will share the team's assessment in an oral report. At this time, team members verify facts, reinforce their impressions, hear reactions,

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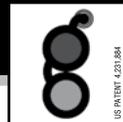
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and give the group an idea of what the written report will contain. Detailed recommendations will follow in the written report, which can take 8 to 16 weeks from the date of the visit. An evaluation team can sometimes complete the assignment in a shorter time period if adequate preparation is made beforehand.

THE EVALUATION CRITERIA

1.0 LEADERSHIP

Senior leaders in an effective facilities organization set direction and establish customer focus, clear and visible values, and high expectations in line with institutional mission, vision, and core values. Effective facilities leaders facilitate the dialogue around larger leadership issues, such as total cost of ownership (TCO), sustainability, recapitalization requirements, and facilities reinvestment.

Leaders inspire the people in the organization and create an environment that stimulates personal and professional growth. They encourage involvement, development and learning, innovation, and creativity. Leaders act as both educators and change agents.

2.0 FACILITIES STRATEGIC AND OPERATIONAL PLANNING

Strategic and operational planning consist of the overall planning process, the identification of goals and actions necessary to achieve success, and the deployment of those actions to align the work of the organization.

The successful facilities organization anticipates many factors in its strategic planning efforts: changing customer expectations, business and partnering opportunities, technological developments, institutional master plans, programmatic needs, evolving regulatory requirements, building organizational capacity, and societal expectations, among other criteria.

3.0 CUSTOMER FOCUS

Customer focus is a key component of effective facilities management. Various stakeholders (faculty, students, staff, and other administrative departments) must feel their needs are heard, understood, and acted upon.

Various tools must be in place to assure customer communication, assess and assimilate what is said, and implement procedures to act on expressed needs. To be successful, a facility department must ensure that its customers have an understanding of standards, tasks, roles, frequencies of services, etc.

4.0 ASSESSMENT AND INFORMATION ANALYSES

Assessment and information analysis describes how your organization uses information and analyses to evaluate and drive performance improvements. Of interest are the types of tools used and how the tools are used to measure and enhance organizational performance.

5.0 DEVELOPMENT AND MANAGEMENT OF HUMAN RESOURCES

An organization's success depends increasingly on the knowledge, skills, innovation, creativity, and motivation of its employees and partners. The criteria in this section address the ways in which the facilities organization ensures a continuous learning environment and a positive and progressive workplace.

6.0 PROCESS MANAGEMENT

Effective process management addresses how the facilities organization manages key product and service design, delivery processes, and continuous improvement. Process management includes various systems or "core competencies," such as work management, performance standards, estimating systems, planning, design, and construction of new or renovated facilities, space management, event management, and other key processes that affect facilities functions.

7.0 PERFORMANCE RESULTS

The performance of a facilities organization can be assessed in a number of ways: campus appearance, customer satisfaction, employee satisfaction, effectiveness of systems operations, financial results, and supplier/business partner results. Having measurement tools in place to assess such performance is critical in an environment of continuous improvement.

8.0 OTHER CONSIDERATIONS

At the request of the institutional representative, this section would include any items or subjects that are not covered by the criteria in Sections 1 through 7. These items may include those things that are more specific to an individual institution's needs.

HOW DO I BEGIN THE FMEP PROCESS?

Because each evaluation is designed around the needs of each institution, pricing varies. Fees depend on the institution's gross institutional expenditure (GIE) and full-time equivalent (FTE) enrollment; size and complexity of the facility/institution; the number of evaluators and length of the site visit; and any additional considerations an institution would like to be covered as part of the evaluation.

To learn more about APPA's Facilities Management Evaluation Program and how to get started on the process, contact Holly Judd at 703-542-3834 or holly@appa.org. 

Lander Medlin is APPA's executive vice president and may be reached at lander@appa.org. Holly Judd is APPA's executive assistant to the EVP and coordinates the Facilities Management Evaluation Program; she may be reached at holly@appa.org.