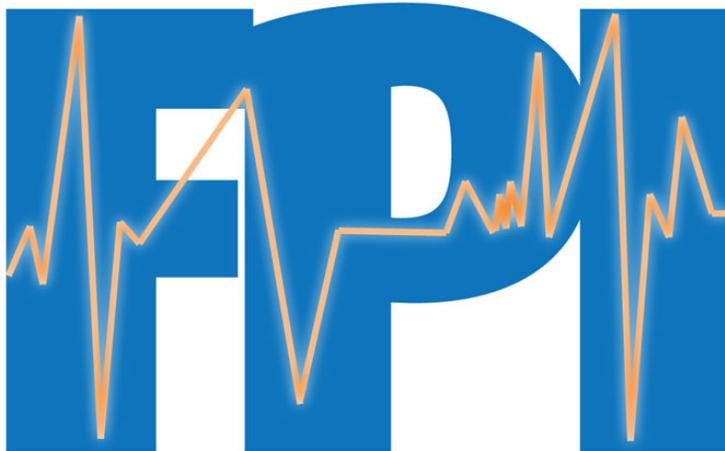


2008-09

Facilities Performance Indicators Report



Tracking Your Facilities Vital Signs

Published By:



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Preface

Welcome to another expanded Web-based *Facilities Performance Indicators Report* (FPI). APPA's Information and Research Committee's goal for this year was to enhance the survey and report tools by making them both more navigable, user-friendly, and accurate. We have made significant progress with all of these initiatives. APPA also automated many of the internal processes for the survey and report, which resulted in a better quality product that can be delivered faster and with more accuracy. APPA will continue to make improvements based on participant feedback, and we welcome any thoughts or comments you would like to provide.

2008-09 Report Innovations

The 2008-09 FPI encompasses many major programming achievements:

- APPA has updated the look and feel of the report by eliminating duplication of pages and streamlining navigation links. The new charting software is far more legible, dynamic, and flexible.
- APPA released the unpublished Report as a beta version for all participants to view and to help APPA ensure that all data sets submitted were accurate.
- Trending for all charts and graphs has been extended from 3 years to 5 years.
- Participants have the flexibility to choose any number of trending years (up to 5) to show on all graphs and charts.
- Canadian and U.S. conversions for the following measures [Dollar/Canadian Dollar, Gross Square Feet (GSF)/Gross Square Meters (GSM), Acres/Hectares] have been automated by clicking a radial button to convert all U.S. to Canadian or vice versa.
- Main menu options have been condensed to eliminate duplication of report pages. The previous Cohort Group Report menu option has now become the former Detailed Report option. In addition, the restriction of selecting only 3 institutions in this report has been lifted, you may now opt to view up to 100 participants.
- The former Preferences menu option has now been integrated with the Executive Level Presentation and the Executive Level Dashboard as well as the Detailed Reports. This change will allow participants to select unique institutions and sort criteria among the different reports.
- The Executive Level Presentation that we debuted last year has much more functionality this year, including the ability to tab easily through all 7 survey

modules and change data point selections easily and without having to leave the landing page. All participants can opt to select between 1 to 5 years of trending. The charts can be exported to PowerPoint or Word programs.

- The original Dashboards have been upgraded with new software that will enable participants to more easily and clearly view their data in the dials.
- This year we are debuting our new Executive Level Dashboard feature, which will provide all Chief Business Officers and Senior Facilities Officers with quick and easy metrics that highlight the data sets most relevant for that target group. The charting software is dynamic, and participants can choose to view up to 24 institutions at a time. Data can be sorted by several important criteria including Carnegie, Auxiliary Service, Enrollment Range, and more.
- Raw survey data files are now part of the main menu options. These files represent a convenient and flexible way to customize the data beyond the confines of the standard reports. The data populates into a delimited file that can be easily cut, pasted, and exported to Excel or any other spreadsheet or database.

These enhancements, on top of the potent report capabilities delivered in the 2008-09 FPI Report, make it a flexible, sophisticated, and powerful tool for analyzing, planning, reporting, and managing your facilities operation. No other professional education organization provides such an essential instrument as a membership benefit.

We congratulate the institutions that elected to participate in the 2008-09 FPI Survey, and we celebrate meeting our goals to deliver this superior 2008-09 FPI Report to the APPA membership and other interested parties.

The 2008–09 *Facilities Performance Indicators* report reflects some APPA members' desire for confidentiality. The only institutional list of participants is contained in Appendix A of this text form of the Report.

Participant institutional studies are available to participants who indicate a willingness to share their identity with other participants. These institutions have an abundant amount of information at hand. APPA encourages institutions that have not done so to join those who participated in the Facilities Performance Indicators Survey so that they can also profit from this data discovery process and receive the new Participant Summary Reports.

All others view the non-participant report in which institution names are coded. Those using the confidential Report are advised to examine the institutional listing in the Preferences area, which shows the general statistics about the participants in the survey. This general campus information is provided so that users of this report can evaluate the institutions that have contributed statistics to the averages reflected in the summaries.

The *Facilities Performance Indicators Report* is designed for survey participants, interested professionals, and serious researchers who want to mine the data. The Report includes the following features, among others:

- a comparison of any or all within a cohort group;
- simultaneous display of significant data and ratios and measures for all selected institutions and overall and group averages;
- the capability to read and/or print out the whole range of 2008–09 reports contained in the *Facilities Performance Indicators Report*, including institution-by-institution tables;
- the capability to view all numeric report figures in chart form.
- the ability to export the calculated information and survey entries to Microsoft Excel or other software for additional studies.

Participating institutions from outside the United States were given the option of entering their financial information in their national currency instead of U.S. dollars, size entries in gross square meters instead of gross square feet, and hectares instead of acres. All report entries are available to view in both Metric and Standard. This is the first year that APPA allows all participants to choose how they would like all information contained in charts, graphs, and reports to be displayed as either Metric or Standard.

APPA's Information and Research Committee provided leadership and direction in the development of the Facilities Performance Indicators Survey as well as the innovative new methods used for the data storage, retrieval, and analysis that was constructed under the committee's watch. The 2009-10 Information and Research Committee consists of the following members:

Chair/Vice President for Information and Research Committee:

Randolph Hare, Washington & Lee University

Committee Members

CAPPA: Jeff Brown, University of North Texas

ERAPPA: Norman Young, University of Hartford

MAPPA: Jeri Ripley King, University of Iowa

PCAPPA: Richard Storlie, University of Nevada, Las Vegas

RMA: Greg Wiens, Athabasca University

SRAPPA: Mike Sherrell, University of Tennessee/Knoxville

Member At-Large: Darryl Boyce, Carleton University

Member At-Large: Maggie Kinnaman, APPA Fellow, Past APPA President

Staff Liaison: Steve Glazner, APPA Director of Knowledge Management

FPI Project Manager: Christina Hills, APPA Research Specialist

APPA thanks Heather Lukes of Digital Wise Inc., who supports the APPA website and all programming related to the FPI survey and report. Finally, we thank the many institutions and APPA members who responded once again to our survey and whose participation makes the report both informative and functional.

Interpreting This Report

The purpose of APPA's *Facilities Performance Indicators* is to provide a representative set of statistics about facilities in educational institutions. The 2008-09 iteration of the Web-based Facilities Performance Indicators Survey was posted and available to facilities professionals at more than 3,000 institutions in the Fall of 2009.

Data analysis and cleanup are performed in three phases of report processing:

- The instant reports provided at the completion of certain survey modules are tools for participants to audit their entries and make corrections.
- Survey audits are used to alert participants to data inconsistencies during the survey input period.
- After the survey is closed and measures are calculated, out-of-range numbers are questioned. New tools were developed to select and sort survey entries and calculate report fields.
- Additional errors are discovered during the report beta review period in which participants review their data output.

The report has rare instances in which an entry was correct but was so radical that it was not useful to other institutions. They remain in the database but are excluded from Overall and grouping summaries.

Organization of the Tables

The statistics contained in this report are summarized according to the following categories:

- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Funding Source <ol style="list-style-type: none"> a. Private b. Public 2. Carnegie Classification <ol style="list-style-type: none"> a. Doctoral/Research Universities—Extensive b. Doctoral/Research Universities—Intensive c. Master's Colleges and Universities d. Baccalaureate Colleges e. Associate's Colleges f. Specialized Institutions g. K-12 3. Canadian (faux) Carnegie Classification <ol style="list-style-type: none"> a. Doctoral/Research b. Research Universities—High c. Research Universities—Very High d. Master's Colleges and Universities e. Baccalaureate Colleges | <ol style="list-style-type: none"> f. Overall 4. Region <ol style="list-style-type: none"> a. CAPP (Central) b. ERAPP (Eastern) c. MAPPA (Midwest) d. PCAPP (Pacific Coast) e. RMA (Rocky Mountain) f. SRAPP (Southeastern) 5. Student Full-Time-Equivalent Enrollment Range <ol style="list-style-type: none"> a. 0 to 999 b. 1,000 to 1,999 c. 2,000 to 2,999 d. 3,000 to 4,999 e. 5,000 to 11,999 f. 12,000 to 19,999 g. 20,000+ 6. Auxiliary Services <ol style="list-style-type: none"> a. Included in Entries b. Excluded from Entries 7. Percent Dollars Contracted <ol style="list-style-type: none"> a. Less than 1% b. 1% to 19.9% |
|--|--|

-
- c. 20% to 49.9%
 - d. 50%+
 - 8. Building's Average Age (used selectively)
 - a. Less than 20 years
 - b. 20 to 29 years
 - c. 30 to 39 years
 - d. 40 to 49 years
 - e. 50+ years
 - 9. Cogeneration (used with Energy and Utilities)
 - a. No
 - b. Yes
 - 10. District Utility System (used with Energy and Utilities)
 - a. No
 - b. Yes
 - 11. Custodial Service Level (used with Custodial Services)
 - a. State-of-the-Art-Maintenance
 - b. High-level Maintenance
 - c. Moderate-level Maintenance
 - d. Moderately Low-level Maintenance
 - e. Minimum-level Maintenance
 - 12. Grounds Service Level
 - a. Orderly Spotlessness
 - b. Ordinary Tidiness
 - c. Casual Inattention
 - d. Moderate Dinginess
 - e. Unkempt Neglect
 - 13. Maintenance Level
 - a. Showpiece Facility
 - b. Comprehensive Stewardship
 - c. Managed Care
 - d. Reactive Management
 - e. Crisis Response
 - 14. Customer Overall Satisfaction
 - a. 3 Satisfied
 - b. 4 Very Satisfied
 - c. 5 Extremely Satisfied
 - 15. Employee Overall Satisfaction
 - a. 2 Very Dissatisfied
 - b. 3 Satisfied
 - c. 4 Very Satisfied
 - 16. Performance Self-Evaluation (Financial, Internal Processes, Customer Satisfaction, and Learning & Growth)
 - a. 1. Copper No Program
 - b. 2. Bronze Beginning Program
 - c. 3. Silver Mature Program
 - d. 4. Gold Stretch Goal
 - e. 5. Platinum Flawless Program
 - 17. Cohort Average (Seen if public)
 - a. Canadian Universities
 - b. California State University System
 - c. University of North Carolina System

Funding, Carnegie classification, and student enrollment were audited against IPEDS (Integrated Postsecondary Education Data System) records, and an APPA region was assigned according to the state or province in the institution's address. Institutions designated K–12 are in an artificial “K–12” Carnegie classification. Non-U.S. institutions participating in the survey were given self-assigned Carnegie classifications based on the current classification definitions.

Comments on Three of the Detailed FPI Reports

Participant Demographics/General Data

Participant Demographics/General data is a new Report Section that provides the user of the 2008–09 *Facilities Performance Indicators Report* a perspective on the type of institutions that are included in the statistical pool.

Operating Costs Report

The Operating Costs Report consists of a series of reports on operational expenses (in-house labor, in-house nonlabor, and contract costs). The measures include FTE from Personnel Data and Costs by survey module compared to GSF/GSM. These costs, FTE, and GSF/GSM per acres/hectares are broken down into six functions performed by facilities operations: administration, construction/renovation/architecture and engineering, custodial services, energy/utilities, landscaping/groundskeeping, and maintenance/trades.

Some things to be aware of when looking at the Operating Costs Report are:

1. The information about contracted services was improved by new data captures in Operating Costs and in Personnel Data and Costs sections of the survey. GSF/GSM completely serviced by a contractor and contractor FTE performing work otherwise done by in-house labor are the new data points. These new data points make the FTE per GSF/GSM and the FTE per Student FTE measure by function more accurate.
2. The GSF/GSM reported for the Construction A&E function was limited to the footage under planning, bid, award and/or construction during the 2008-09 fiscal year. In 2008-09, participants were given two choices: footage under planning, bid, award, and construction; or total campus GSF/GSM. The cost per GSF/GSM is reported both ways.

Strategic Financial Measures Report

The Strategic Financial Measures are highly dependent on the Current Replacement Value (CRV) estimates since CRV is the divisor in formulas for most of its measures. CRV estimates become more realistic with each survey. However, before you select a campus as a comparison cohort for strategic measures, check its gross CRV estimate value per GSF/GSM. The two components for this calculation are in the Significant Supporting Data line (Total campus GSF/GSM w/Aux and Current Replacement Value). CRV/GSF/GSM averages are to include infrastructure and reflect current construction costs. You probably would not want to compare your performance against a campus that has a CRV/GSF/GSM value that is significantly different from yours.

Report Characteristics

Several characteristics of the way the survey is computed should be kept in mind, because these techniques tend to bias the averages in the report.

- Blanks and zeros were not included in computations except in a few cases where there was no question that zero was a legitimate entry. The data collection system does not distinguish between no entry and no cost. (Respondents may enter only the information that was of interest to their campus.) Statistics do not include zero or null entries. This statistical method affects almost every portion of the report.
- No summary averages are computed as averages of averages, because that is not valid. Summary averages are the sum of all entries divided by the count of all entries.
- The data generally do not conform to a standardized bell curve. Typically, data are clustered at the low end of a range rather than being symmetrical around the mean. As a result, the median figures are typically somewhat lower than the average figures that are reported.
- A summary that breaks groups down into many categories will produce some small counts, and counts vary from measure to measure since respondents do not answer all survey questions. The average for a small count should be used with caution. Please activate the "Count" button on the Detailed Report data summaries line before evaluating the grouping statistics. This *Web-based Facilities Performance Indicators Report* includes counts for all group averages.
- Look at historical bar charts to identify those group averages that appear to be stable statistics and those that have large fluctuations. A small sample size typically produces fluctuations from year-to-year.

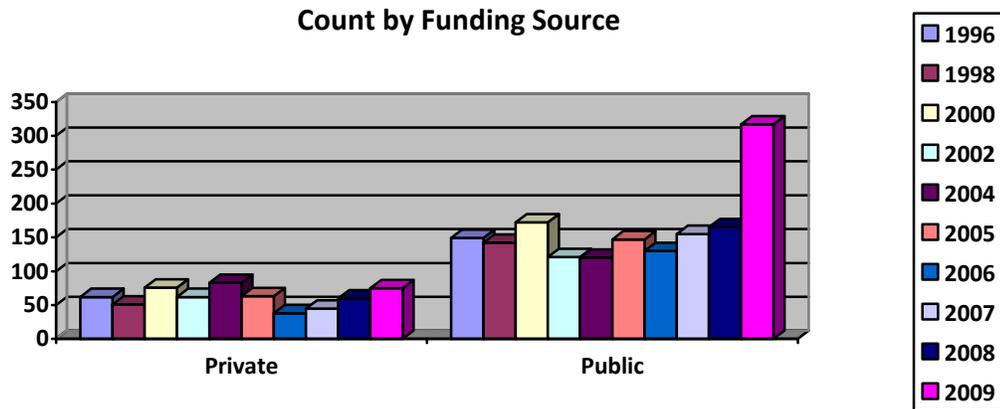
Despite these disclaimers, the statistics are generally representative, and therefore valid, as substantiated by consistent data that are illustrated in historical charts. Where the statistics are historically different, the validity of the data can be substantiated by identifying the sources of data differences, such as the influence of non-traditional specialized institutions in the participant pool. This is a general caution and should not be viewed as a shortcoming of APPA's current Facilities Performance Indicators Survey. Biases, reporting consistency, and other concerns are always present when evaluating statistical information, and it is always important to know how to make valid comparisons. Keeping this in mind is the best way to ensure that this report is used effectively.

FY 2008-09 Respondents and Participation Trends

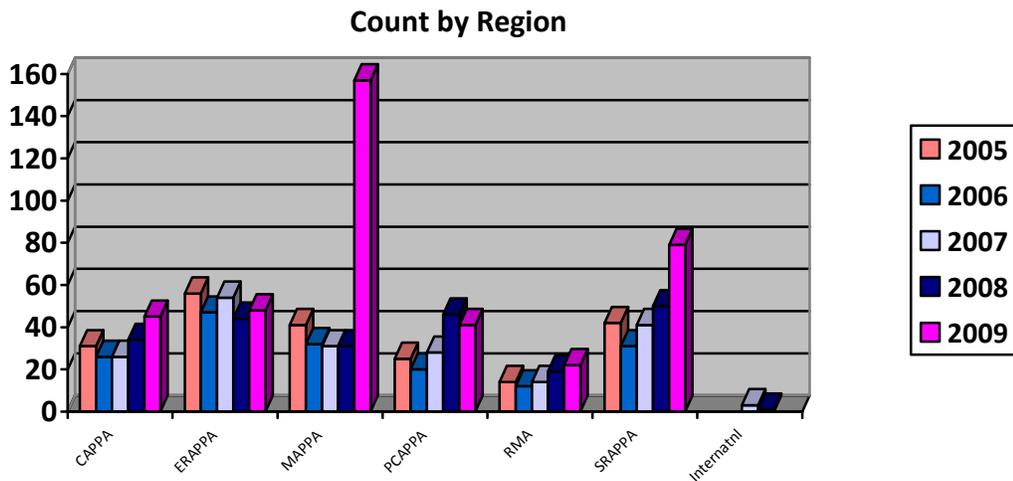
There are 392 participants in the 2008-09 Report. There have been two spikes with survey participation in the past: in 1994, 516 institutions responded when APPA made a concerted effort to survey community colleges; and in 2000, the first time the survey could be completed online on the APPA website, 248 institutions took part. In other years, about 200 institutions—plus or minus 10 percent—participated in the survey. This year there was a significant increase in the number of participants – a near doubling of the participants.

Up until 2003, about 30 percent of the participant pool consistently came from institutions that had private sources of funding, and 70 percent came from those that had public sources.

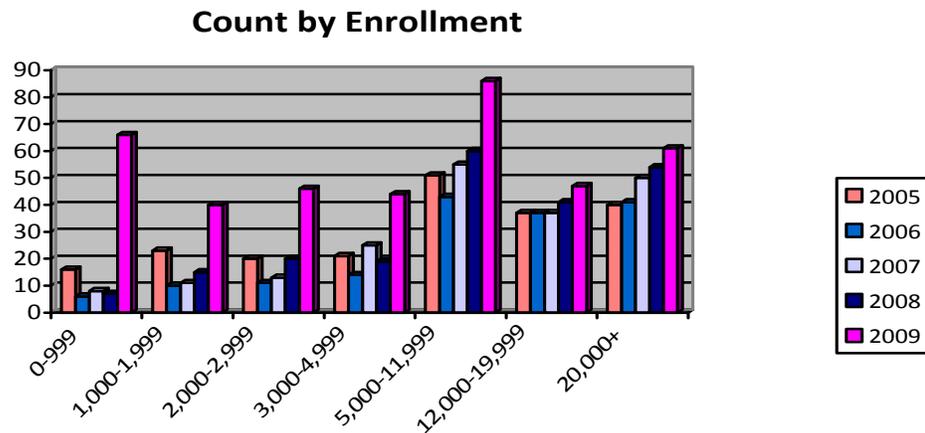
- In 2004 the representation by the private sector increased to 40 percent by a larger participation of private K–12 institutions.
- In 2005, private institutions were 30 percent of the total.
- They dropped to 23 percent of the participants in 2006 and retained that ratio in 2007.
- 2008 had a slight increase to 27 percent for the private institutions.
- 2009 has a decrease of 19 percent compared to last year for private institutions. This is due to the 75 percent increase in total number of institutions participating. The actual number of participating private schools was more than last year but the percentage was lower.



All APPA regions are represented in the report, with the largest number of respondents coming from the Midwestern region (MAPPA), Southeastern region (SRAPPA), the Central region (CAPPA), and the Eastern region (ERAPPA). There were no International participants this year. (APPA had a spike in the MAPPA region this year due to its partnership with MHEC (Midwestern Higher Education Compact) whose members are all located in the MAPPA region).



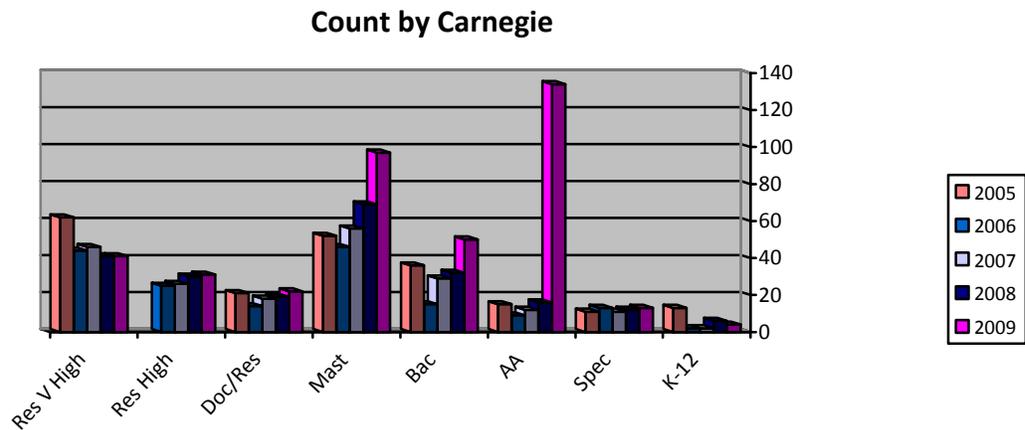
Participating institutions' enrollment ranges—which start at 0 and go up to 20,000-plus—has been rather consistent over the last seven survey cycles. The bar chart below shows that the enrollment range distribution in 2009 follows the normal experience levels.



The representation of institutions as categorized by the Carnegie classifications has been generally consistent. The change in Carnegie classifications for the doctoral and research institutions changed from two categories into three in 2006. APPA decided to couple Doctoral/Research Intensive to Doctoral Research and Doctoral/Research Extensive to Research Very High. That left Research High as a lone new category. The trend over the past few years is growth in participation in the Masters Carnegie class.

Specialized institutions are shown as one category in the chart. The FPI shows this Carnegie classification as Specialized (count 5) and Specialized Medical (count 7).

While the counts are small when this division is made, the Medical Centers need to make comparisons within their own group and not a mixture of medical and other types of specialized institutions.



Carnegie Classifications

The following are descriptions of the primary institutional classifications as defined by the Carnegie Foundation for the Advancement of Teaching:

Doctorate-granting Universities: Includes institutions that award at least 20 doctoral degrees per year (excluding doctoral-level degrees that qualify recipients for entry into professional practice, such as the JD, MD, PharmD, DPT, etc.). Excludes Special Focus Institutions and Tribal Colleges.

Research Universities Very High Research Activity
Research Universities High Research Activity
Doctoral/Research Universities

Master's Colleges and Universities: Includes institutions that award at least 50 master's degrees per year. Excludes Special Focus Institutions and Tribal colleges.

Baccalaureate Colleges: Includes institutions where baccalaureate degrees represent at least 10 percent of all undergraduate degrees and that award fewer than 50 master's degrees or fewer than 20 doctoral degrees per year. Excludes Special Focus Institutions and Tribal Colleges.

Associate's Colleges: Includes institutions where all degrees are at the associate's level or where bachelor's degrees account for less than 10 percent of all undergraduate degrees. Excludes institutions eligible for classification as Tribal Colleges or Special Focus Institutions.

Special focus Institutions: Institutions awarding baccalaureate or higher-level degrees where a high concentration of degrees is in a single field or set of related fields. Excludes Tribal Colleges.

Specialized
Specialized/Medical Medical schools and medical centers

K-12: This includes schools and school districts focusing on primary and secondary education. It is not a Carnegie Classification, but one assigned for the purposes of the FPI Report.

APPA Regions

APPA's six geographical regions function independently of APPA and offer their own educational programs, annual meetings, scholarships, and other benefits. Each region maintains its own set of officers, committees, and activities to serve member institutions within the region. Regions determine their own membership requirements, dues, structure, and services.

Regions work with APPA to ensure that international programs address concerns of interest to all members. To maintain strong links among all regions, each region is represented on the APPA Board of Directors and on APPA committees.

APPA chapters are general city-wide or state-wide organizations of members who meet periodically to share information and discuss issues of local or state interest.

Institutions from outside the United States of America and Canada are put into an "International" region for the purpose of this FPI Report. A concentration of institutions from any one foreign region will be recognized in future FPI Reports.

Up-to-date information about the APPA regions—including conference dates, contact information, and links to the regional websites—are available on APPA's website at <http://www.appa.org/regions/index.cfm>.

Participant Demographics/General Data

Information in this section is provided to assist you in your evaluation of information contained in the *2008-09 Facilities Performance Indicators Report*.

- The count of institutions in each group pool used in report statistical summaries.
- Characteristics of the institutions that make up each grouping's statistical pool.

The charts and tables in Participant Demographics shows whether the distribution within a grouping could be considered significant for your purposes.

- Funding source includes counts of 75 private and 317 public institutions. Both of these are ample samplings.
- The grouping according to Carnegie classification has low counts for Specialized (6), Specialized/Medical (7), K-12 (4), and Doctoral/Research (22).
- The breakdown by APPA region shows ample counts except for RMA, the least populated region, which had 22 institutions in this study.
- Several enrollment ranges had ample samplings.
- The grouping on auxiliary services has 187 including auxiliaries and 205 excluding auxiliaries.
- The <20 years building age range count is 25. T
- he other building age ranges have counts between 53 and 152.
- The summaries for the various levels of service, customer satisfaction, employee satisfaction, and the performance self-evaluations will have low counts on the low and high extremes of the scales.

Tables in this report show counts for all entries. Some participants completed only a few of the modules, some erroneous entries have been eliminated, and participants sometimes did not answer every question within a module.

Consequently, the counts on most tables throughout this report can be expected to be *lower* than those shown in the Participant Demographics charts and tables. Noting the counts on statistical tables can help the user decide whether or not the statistics are useful to a particular operation's purposes. This report has not produced cross-tab tables between two groupings, because many entries in such tables would have low counts. Below are counts of participants by survey module.

About Facilities	392
What Facilities	392
CRV Worksheet	140
Adequate Funding	259
Desired Outcomes - Op Costs Staffing Ratios Administration	237
Desired Outcomes - Op Costs Staffing Ratios Construction/Renovation/AE	215
Desired Outcomes - Op Costs Staffing Ratios Custodial	235
Desired Outcomes - Op Costs Staffing Ratios Landscaping/Grounds	232
Desired Outcomes - Op Costs Staffing Ratios Building Maintenance	233
Desired Outcomes - Op Costs Staffing Ratios Energy/Utilities	347
Desired Outcomes - Op Costs Staffing Ratios Other Operations	202
Desired Outcomes - Business Practices	204
MMBTU Worksheet	173
Right Investments	207
Customer Satisfaction	187
Sustaining Excellence	184

APPENDIX A

2008-09 Facilities Performance Indicators Participants

Abraham Baldwin Agricultural College	California State University/Fresno
Albany State University	California State University/Fullerton
Alexandria Technical Institute	California State University/Long Beach
Angelo State University	California State University/Los Angeles
Anoka Technical College	California State University/Monterey Bay
Anoka-Ramsey Community College	California State University/Northridge
Anoka-Ramsey Community College/Cambridge Campus	California State University/Sacramento
Appalachian State University	California State University/San Bernardino
Arizona State University	California State University/San Marcos
Arkansas State University	California State University/Stanislaus
Armstrong Atlantic State University	Camosun College
Atlanta Metropolitan College	Carleton College
Augusta State University	Carleton University
Aurora University	Carthage College
Avila University	Casper Community College
Babson College	Central Lakes College
Bainbridge College	Central Lakes College/Staples
Barry University	Century College
Baylor College of Medicine	Chippewa Valley Technical College/Chippewa Falls
Bemidji State University	Chippewa Valley Technical College/Eau Claire
Black Hills State University	Chippewa Valley Technical College/Menomonie
Blackhawk Technical College/Airport	Chippewa Valley Technical College/River Falls
Blackhawk Technical College/Janesville	Chippewa Valley Technical College/West/Gateway
Blackhawk Technical College/Monroe	Cincinnati State Tec & Community College
Blackhawk Technical College/Transportation Center	The Citadel
Bowling Green State University	City Colleges of Chicago
Brigham Young University/Idaho	Clark University
Brigham Young University/Utah	Clayton State University
Butler University	Coastal Georgia Community College
California Maritime Academy	College of the Desert
California Polytechnic State University	College of Wooster
California Polytechnic State University/Pomona	Colorado State University/Pueblo
California State University/Bakersfield	Columbia University Medical Center
California State University/Chico	Columbus State University
California State University/Dominguez Hills	
California State University/East Bay	

Concordia College/Moorhead	John Brown University
Creighton Preparatory School	John Carroll University
Creighton University	Kankakee Community College
Dakota County Technical College	Kansas State University
Dalton State College	Kennesaw State University
Darton College	Kettering University
Delta College	Kwantlen Polytechnic University
Denison University	Lake Michigan College
Dickinson College	Lake Superior College
Dominican University	Lake Superior State University
East Georgia College	Lakeshore Technical College
Eastern Illinois University	Laurentian University of Sudbury
Eastern Mennonite University	Lethbridge College
Elizabeth City State University	Lewis University
Elizabethtown College	Liberty University
Elmhurst College	Longwood University
Embry-Riddle Aeronautical University	Loras College
Fanshawe College of Applied A & T	Loudoun County Public Schools
Fayetteville State University	Louisiana State University
Fond Du Lac Community College	Loyola Marymount University
Fort Valley State University	Luther College
Fox Valley Technical College	Macon State College
Fox Valley Technical College/Oshkosh	Madison Area Technical College
Franklin College/Indiana	Madison Area Technical College/Fort Atkinson
Gainesville State College	Madison Area Technical College/Portage
Gateway Technical College	Madison Area Technical College/Reedsburg
Gateway Technical College/Elkhorn	Madison Area Technical College/Watertown
Gateway Technical College/Racine	Maryville University of St. Louis
Gateway Technical College/Sturtevant	McMaster University
Georgia College & State University	Medical College of Georgia
Georgia Gwinnett College	Medical University of South Carolina
Georgia Highlands College	Meredith College
Georgia Perimeter College	Mesabi Range Community & Technical College/Eveleth
Georgia Southern University	Mesabi Range Community and Technical College
Georgia Southwestern State University	Metropolitan Community College/Kansas City
Georgia State University	Metropolitan State University
Georgia Tech	Miami University
Gordon College/Georgia	Middle Georgia College
Goshen College	Mid-State Technical College
Grant Macewan College	Mid-State Technical College/Marshfield
Hendrix College	Mid-State Technical College/Stevens Point
Hennepin Technical College	Milwaukee Area Technical College
Hibbing Community College	Milwaukee Area Technical College/Mequon
Howard Community College	Milwaukee Area Technical College/Oak Creek
Humboldt State University	Milwaukee Area Technical College/West Allis
Husson University	Minneapolis Community and Technical College
Illinois Central College	Minnesota State College/Moorhead
Indiana University/Bloomington	Minnesota State College-Southeast Technical/Redwing Campus
Indiana University/Kokomo	
Indiana University-Purdue University/Fort Wayne	
Inver Hills Community College	
Iowa State University	
Itasca Community College	
Ivy Tech Community College - Richmond	
Ivy Tech/Central Indiana	

Minnesota State College-Southeast Technical/Winona Campus	Northland Community & Technical College/EGF
Minnesota State Community & Technical College/Detroit Lakes	Northland Community & Technical College/TRF
Minnesota State Community & Technical College/Fergus Falls	Northwest Missouri State University
Minnesota State Community & Technical College/Moorhead	Northwest Technical College/Bemidji
Minnesota State Community & Technical College/Wadena	Northwestern College/Minnesota
Minnesota State University/Mankato	Occidental College
Minnesota West Comm/Tech College	Ohio Wesleyan University
Minnesota West Community & Technical College/Granite Falls	Oklahoma City Community College
Minnesota West Community & Technical College/Jackson	Oklahoma State University/Stillwater
Minnesota West Community & Technical College/Pipestone	Old Dominion University
Missouri State University	Olivet Nazarene University
Missouri University of Science and Technology	Oregon Health and Science University
Montana State University	Palm Beach Atlantic University
Moraine Park Technical College	Pepperdine University
Moraine Park Technical College/Beaver Dam	Philadelphia University
Moraine Park Technical College/West Bend	Pine Technical College
Moravian College	Principia College
Mount Allison University	Quebec University in Trois-Rivieres
Neosho County Community College	Queen's University
New Mexico State University	Rainy River Community College
Nicolet Area Technical College	Reed College
Nicolet Area Technical College/Minocqua	Ridgewater College
Normandale Community College	Ridgewater College/Hutchinson
North Carolina A&T State University	Riverland Community College
North Carolina State University	Riverland Community College/Albert Lea
North Dakota State College of Science	Roberts Wesleyan College
North Dakota State University	Rochester City School District/ New York
North Georgia College & State University	Rochester Community College
North Hennepin Community College	Rochester Institute of Technology
Northampton Community College	Ryerson University
Northcentral Technical College/Antigo	Saginaw Valley State University
Northcentral Technical College/Wausau	Saint Cloud State University
Northeast Wisconsin Tech College	Saint Cloud Technical College
Northeast Wisconsin Technical College/Marinette	Saint Louis Community College
Northeast Wisconsin Technical College/Oconto Falls	Saint Louis University
Northeast Wisconsin Technical College/Shawano	Saint Mary's University/Canada
Northeast Wisconsin Technical College/Sturgeon Bay	Saint Paul College
Northern Arizona University	Salt Lake Community College
Northern Michigan University	Samford University
Northern Wyoming Community College District	San Diego Community College District
	San Diego State University
	San Francisco State University
	San Jose State University
	Savannah State University
	Schoolcraft College
	Shepherd University
	Simon Fraser University - Burnaby
	Sinclair Community College
	Skidaway Institute of Oceanography
	Slippery Rock University
	Smithsonian Institution
	Soka University of America
	Sonoma State University
	South Central College/Faribault

South Central College/Mankato	University of Nebraska/Omaha
South Dakota State University	University of Nevada/Las Vegas
South Georgia College	University of Nevada/Reno
Southeast Missouri State University	University of New Brunswick/Fredericton
Southern Polytechnic State University	University of North Carolina/Asheville
Southern Utah University	University of North Carolina/Chapel Hill
Southwest State University	University of North Carolina/Charlotte
Southwest Technical College	University of North Carolina/Greensboro
St. Francis Xavier University	University of North Carolina/Pembroke
St. Thomas University/Florida	University of North Carolina/Wilmington
SUNY College/Buffalo	University of North Florida
SUNY College/Geneseo	University of Northern Colorado
SUNY College/New Paltz	University of Oklahoma
Texas A&M International University	University of Pennsylvania/Philadelphia
Texas State University/San Marcos	University of Prince Edward Island
Trinity University	University of Regina
Tuskegee University	University of Richmond
United States Coast Guard Academy	University of Saskatchewan
University of Alabama/Birmingham	University of Tennessee/Knoxville
University of Alabama/Huntsville	University of Texas/Arlington
University of Alberta	University of Texas/Austin
University of Arkansas	University of Texas/Dallas
University of British Columbia	University of Texas/El Paso
University of Calgary	University of Texas/San Antonio
University of Central Oklahoma	University of Toronto
University of Chicago	University of Toronto/Scarborough
University of Cincinnati	University of Virginia
University of Colorado/Boulder	University of Washington
University of Colorado/Denver	University of Waterloo
University of Connecticut	University of West Georgia
University of Florida	University of Western Ontario
University of Georgia	University of Windsor
University of Guelph	University of Wisconsin/Madison
University of Hartford	University of Wisconsin/Stout
University of Hawaii/Manoa	Ursinus College
University of Illinois/Urbana-Champaign	Valdosta State University
University of Kansas	Vanderbilt University
University of Kentucky	Vermilion Community College
University of La Verne	Villanova University
University of Lethbridge	Wake Forest University
University of Maine/Orono	Washington & Lee University
University of Manitoba	Washington State University
University of Mary Hardin-Baylor	Washington University School of Medicine
University of Mary Washington	Waukesha County Technical College
University of Maryland/Baltimore	Waukesha County Technical College/Waukesha
University of Memphis	Waycross College
University of Michigan/Dearborn	Western Carolina University
University of Minnesota/Twin Cities	Western Michigan University
University of Missouri/Columbia	Western Technical College
University of Missouri/Kansas City	Western Technical College/Black River Falls
University of Missouri/St Louis	Western Technical College/Independence
University of Moncton	Western Technical College/Mauston
University of Montana/Missoula	Western Technical College/Sparta
University of Montreal	Western Technical College/Tomah
University of Nebraska/Kearney	Western Technical College/Viroqua
University of Nebraska/Lincoln	

Western Washington University
Wilfrid Laurier University
William Mitchell College of Law
Williamson County School Board
Winona State University
Winston-Salem State University
Wisconsin Indianhead Technical
College
Wisconsin Indianhead Technical
College/Ashland
Wisconsin Indianhead Technical
College/New Richmond
Wisconsin Indianhead Technical
College/Rice Lake
Wisconsin Indianhead Technical
College/Superior
Wisconsin Lutheran College
Xavier University
York University

APPENDIX B

Background

History of the Facilities Performance Indicators Survey and Report

The facilities professionals at colleges, universities, K–12 schools, and districts work to achieve excellence through the constant improvement of the services they contribute in support of missions and goals of their institutions.

The goals of APPA's Information and Research Committee include providing facilities professionals with an integrated set of tools and information that they need to improve their organizations' financial performance and the effectiveness of their primary processes, facilities employees' readiness to embrace the future, and the facilities department's ability to satisfy its customers.

The Information and Research Committee is constructing an integrated research information database for educational facilities. The structure of the new Facilities Performance Indicators Survey was redesigned and the survey's first tool for developing statistical files on educational facilities—the new Web-based modular Facilities Performance Indicator Survey—debuted in March 2005 and collected data from the fiscal year 2003-04. The survey was administered each Fall from 2005 through 2009. Depending on participation and prior report purchases, APPA provides Report users access to an unlimited rolling set of Web-based FPI reports.

Programming the FPI report for the Internet changed it from a static publication to a dynamic tool for user-driven comparisons. It is evolving into an instrument to depict statistics in three views: statistical reports, bar charts, and dashboard dials. Each of the past years' programming broadened the capabilities of these views. The 2005-06 report introduced the first phase of the view of data on Dashboards. The 2006-07 FPI Report contained expanded Dashboard capabilities. The 2006-07 Report also introduced a new set of Participant Summary Charts that replaced the limited Bonus Reports provided in the past. The 2008-09 Report provides the updated Cohort Report, more preference capabilities, new Report Dashboard dials and charting software as well as enhanced capabilities for the Executive Level Presentation and the debut of the new Executive Level Dashboards.

The Facilities Performance Indicators Survey (FPI) supersedes and builds upon the two major surveys APPA conducted in the past: the Comparative Costs and Staffing (CCAS) survey and the Strategic Assessment Model (SAM). The FPI covers all the materials and data collected in CCAS and SAM, along with some select new data points, indicators, and improved survey tools. This new “combo” survey first introduced in 2005 includes the following features:

- a modular structure, which offers flexibility that allows an institution to decide which aspects of operations to measure and evaluate each year;
- one-time capture of general campus information in the first survey module, which alleviates the need to record the same statistics for each APPA survey taken;
- automated worksheets, which enable users to step through the calculation of current replacement value (CRV) and British thermal units (BTUs) - exercises that have proved difficult for many survey respondents in the past; and
- instant reports that are generated upon the completion of a number of the modules, thereby providing immediate calculations that allow users to evaluate the accuracy of their data points and receive immediate feedback on their operations.

This Web-based 2008-09 *Facilities Performance Indicators Report* consists of the following sections:

- **Preferences:** A new Report capability in 2008-09 whereby you set default institutions for comparisons, your preferred group summary, and chart design options.
- **Participant Demographics/General Reports:** New Report sections in 2008-09 containing demographics, and general data on participant campuses that can be viewed at a single glance.
- **Participant Summary Reports:** A new Report section in 2008-09 (replacing the former, limited Bonus Reports) that showcases participant scores in an essential set of measures against the participant’s cohort groups and any two other participating institutions. This section is built around the Essential Question Set and includes the capability of producing a desk top executive level presentation of FPI measurements.
- **Detailed FPI Reports:** The detailed FPI Reports of the past were organized in memory of the historic APPA reports so that one set addressed operating costs, another set addressed personnel data and costs, etc. In 2008-09, the detail reports are reorganized around the Essential Set Questions. The preponderance of report screens fall under Question 4, *Are the operating funds that my facilities department receives being spent in a manner that supports desired outcomes?*

These reports now are pulled together by core facilities functions. Each core function has a group of three report screens that show summary and drill-down detail information:

- Operating Costs and Staffing Ratios
- Personnel FTE and Salaries (drill-down detail)
- FTE & Salaries Ratios and Measures

This grouping makes it much easier to build a total picture of performance from cost, efficiency, salary levels, and staffing perspectives. This is also the section wherein the detailed FPI Reports are viewed through the perspective of a cohort grouping. Cohort screens can show all institutions within the group, or any one or more of the group members.

- **Executive Level Dashboard:** This year we are debuting our new Executive Level Dashboard feature, which will provide all Chief Business Officers and Senior Facilities Officers with quick and easy metrics that highlight the data sets most relevant for that target group. The charting software is dynamic and participants can choose to view up to 24 institutions at a time. Data can be sorted by several important criteria including Carnegie, Auxiliary Service, Enrollment Range, and more.
- **Executive Level Presentation:** The Executive Level Presentation that we debuted last year has much more functionality this year, including the ability to tab easily through all 7 survey modules and change data point selections easily without having to leave the landing page. All participants can opt to select between 1 to 5 years of trending. The charts can be saved for future review and/or exported to PowerPoint or Word programs.
- **Report Dashboards:** An updated set of dials was incorporated into the FPI so that transportation among Report sections and dashboards was greatly simplified. The dashboards overlay an institution's measurement scores on to dials with visual comparisons to overall averages. Goals can be inserted to show the future desired performance positions. The 2008-09 dials include a new Tab for the Essential Set Questions.
- **Raw Survey Data files:** Raw survey data files are now part of the main menu options. These files represent a convenient and flexible way to customize the data beyond the confines of the standard reports. The data populates into a delimited file that can be easily cut, pasted, and exported to Excel or any other spreadsheet or database.
- **Monetary Conversion**
The 2006 Canadian Dollar conversion factor used was \$1.00 CAD = \$0.86 USD. The 2007 and 2008 FPI Reports have no Canadian Dollar conversion. The 2009 FPI Report used the Canadian Dollar conversion factor of \$1.00 CAD = \$0.95 USD.

The range of information contained in the Web-based *Facilities Performance Indicators Reports* is much broader than what has been covered in any APPA survey summary before 2005. The organization and approach of the report has been redesigned as well. The Report contains all of the bar charts and statistical tables that APPA members have grown to expect and more. The Report also includes sections that introduce new methods for organizing data displays.

- A string of ratios and measures for each Essential Question/core function provides a variety of measurement perspectives.
- Significant supporting data shows the base information used in most of the ratio calculations.

In 2005, APPA broke new ground in its reporting scope with the *Building and Space Report*. The 2008-09 FPI report has placed most of these reports in the Participant Demographics/General Reports section of the *FPI Report*. Outside of the FPI reports, the space data is being used for studies on energy consumption. APPA continues to explore ways to improve the energy/utilities function information with a special energy survey based on a select set of FPI survey questions launched in February 2009. There are opposing interests for keeping data entry simple for the non-engineer and for providing meaningful and normalized energy/utility statistics.