

# 2016

APPA THOUGHT LEADERS SERIES

# REMAKING THE FACILITIES ORGANIZATION



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**APPA** is the association of choice serving educational facilities professionals and their institutions. APPA's mission is to support excellence with quality leadership and professional management through education, research, and recognition. APPA's **Center for Facilities Research (CFaR)** engages in a deliberate search for knowledge critical to educational facilities management and to policy making in education. CFaR encourages the study of the learning environment, appropriate management strategies, and their impact on education.

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### **Dedicated to Earl H. Potter III**

APPA and the entire Thought Leaders family dedicates this year's report to Earl H. Potter III, president of St. Cloud State University in Minnesota. Earl died June 13 in a highway accident while on university business. Earl attended his first Thought Leaders symposium in 2011 and continued to participate in five of the six following years, including this most recent symposium held just two months before his passing. He was a thoughtful and engaged presence in the symposium and contributed detailed and constructive critiques to the draft Thought Leaders reports, offering suggestions that always strengthened the final product. Not many college presidents are as dedicated as Earl to the larger community of facilities service personnel. He chose to give his time and attention to our topics and impressed all who met him with his probing questions, logical suggestions, and meaningful perspective. The Thought Leaders program is better because of Earl, and he will be greatly missed.



## Section I: *Executive Summary*

### Why remake the higher education facilities organization?

The theme of the 2016 APPA Thought Leaders symposium was “Remaking the Facilities Management Organization.” This immediately raises two questions: Why should the organization be remade? What should it look like at the end of its transformation?

The answer to the first question is rooted in the challenges facing all higher education institutions—challenges of rising costs and declining state support, of soaring student debt and sinking budgets. These challenges are well-known to all in higher education. Less understood is another challenge: **The culture in which many staff and administrators operate lacks focus.** Staff go about their jobs, with many performing their work well, but as a unit they are not striving together toward a single goal.

The result? Missed opportunities to **create exceptional experiences** for students, parents, faculty, and other customers of the institution. Missed opportunities to drive excellent delivery of service consistently and with disciplined execution.

An exceptional experience for higher education customers means that every time individuals step on campus or interact with a member of the staff, they are made to feel welcome, respected, treated with consideration, and leave believing they were heard and that their needs were given top priority. When customers have these sorts of experiences, their sense of appreciation and loyalty soars, thereby, becoming advocates for the institution—devoted alumni, dedicated community promoters, and enthusiastic donors.

To answer the second question, the remade facilities

management organization should possess a **culture dedicated to the mission of the institution and committed to creating exceptional customer experiences, driven to effectively deliver excellence consistently over time.**

The culture is critical. Customer loyalty doesn’t develop by accident. It is the deliberate result of a strong organizational culture. Facilities organizations can build on this culture to craft policies and implement systems that enhance the customer experience through effective delivery systems. At the same time, they can reap the benefits of engaged employees and streamlined processes.

### Moving toward an engaged, committed facilities organizational culture

This report, which draws on the discussions of higher education leaders at the Thought Leaders symposium as well as the views of industry experts in customer service, begins by **examining the characteristics of the best—and the worst—customer service organizations.** The first section of the report pulls back the curtain to examine the inner operations of organizations that routinely produce exceptional customer experiences. By the section’s conclusion, we come to understand the essential traits of excellent customer service organizations: a culture and leadership that prioritize the customer experience, policies and processes that promote customer service, and employees who demonstrate commitment and a passion for excellence.

The report continues by making the case for a customer-centric higher education facilities organization. Experts provide their insights on how a focus on the customer provides a framework for driving change. The benefits of a customer-centric focus detailed in this section include **empowered employees, better alignment between the mission of the facilities organization and**

**the mission of the institution, and improved stewardship of campus systems and resources.**

The final substantive section of the report examines in detail how a customer-centric focus can be applied to the **four major responsibilities of educational facilities organizations**: 1) general administration and management; 2) operations and maintenance; 3) energy and utilities; and 4) facilities planning, design, and construction. This section defines goals within each of

these areas and suggests strategies for facilities leaders to achieve these goals.

Throughout the report, we have included “Questions for Reflection,” which provide opportunities for you to pause and consider how the information in this report applies to your organization. We encourage you to use these questions as points of departure where you can engage others in your institution in thoughtful debate about **the value of the customer experience in your organization and how that experience could be improved.**

## Section 2: Introduction

I called a computer printer company's customer service about my new printer that wouldn't interface with my computer, even though the company swore it would easily work. After hours of being on hold and being told that I had obviously done something wrong or just couldn't understand, the rep told me, "Yeah, really not my problem, lady."

– Quoted from Kate Nasser, "The 25 Worst Customer Service Stories to Train the Best CSRs," *The Smart SenseAbilities Blog*, [www.KateNasser.com](http://www.KateNasser.com).

There's something irresistible about a **terrible customer experience**. We have all endured inferior service at some point in our lives, and we immediately identify with the fury that comes when those who are supposed to help us actually make our lives more difficult. In fact, the emotional impact of these experiences can last a lifetime.

On the other side of the coin, none of us wants to acknowledge that sometimes we've been guilty of providing poor customer service. It is likely that even the most talented waitresses and IT techs, the most proficient cab drivers and receptionists, and the most qualified engineers and accountants have had bad days and took it out on customers—intentionally or not. What's particularly painful for those of us in higher education is the realization that even we, representing the colleges and universities of the United States, Canada, and Mexico have sometimes been **guilty of disappointing those we are supposed to help**.

That stings. We are supposed to nurture our communities, guide our students, and support our faculty and fellow staff. Yet, we can all remember an occasion when we as a community were less than helpful. We can all come up with reasons (or excuses): too many pressures, too much bureaucracy, not enough money, not enough time. The fact remains that we have not always followed

the Golden Rule and treated others the way we would like to be treated.

Below campus, the transit authority was putting in a new light-rail line. They were digging a tunnel, and that meant they were disturbing things, and that brought up some rodents. One day, a professor walks into a classroom where he is about to do a lecture, and there's a large dead rat on the floor. So he calls the facilities department. A guy shows up in a hazmat suit. He carefully puts hazard tape around the dead rat, and then he leaves. Just leaves it there.

– A 2016 APPA Thought Leaders symposium participant

The **pressure on higher education** to provide an exceptional experience is greater now than ever before. The competition between colleges and universities is too fierce for institutions to ignore how they treat students and their families. Similarly, the competition between academic programs for top-notch teachers and researchers is too keen for institutions to ignore how they treat faculty. Scrutiny from government agencies has never been more intense, and today's students approach colleges and universities with a consumer mind-set.

But the problem goes deeper. Higher education cannot continue to operate as it has. Costs continue to rise, while state revenue declines. Many local campuses do not control their tuition revenue. Some boards have implemented tuition freezes, while other institutions raise tuition to maintain quality, but this pushes the cost onto students. Students can no longer afford the increases, and although tuition discounting and financial aid reduce the real "sticker" price students pay, the level of student debt still soars, and tuition discounting rates cannot drop much further. The **situation is nearly unsustainable**.

The challenge to each institution depends on multiple factors: public versus private, large versus small, urban versus rural. A small private institution with a historic campus confronts issues quite different from those faced by a large land-grant university or urban community college. But while the specifics of the challenge are unique to each campus, overall trends hold across the industry.

The challenges push us to do better.

We who pursue the day-to-day work of running a college or university have to act now in whatever ways we can to make higher education a viable, valuable long-term proposition. That includes maintaining and enhancing our facilities. Higher education facilities organizations must act as **responsible stewards** of the buildings and grounds in their charge while seeking to ensure the long-term stability and preservation of the institution. In other words, we need to do better with as little money as possible. They've already shown themselves capable of meeting the challenge. Despite the financial impact of the recession and the simultaneous surge in enrollment, despite budgets that have remained flat even as the recession waned, and despite the challenges of maintenance backlogs, aging buildings, and changing pedagogies, facilities organizations have kept the lights on and the doors open. Very few institutions have had an interruption in programs or services because buildings failed. That is commendable in and of itself.

Facilities staff are **creative, innovative, and hard-working professionals**. Leaders have invested their budget dollars in data systems that allow them to manage their resources better. They've fought hard for preventive maintenance programs that extend the lifecycles of systems. They've found ways to stretch their staff and to control costs.

And we must do even more.

I was trying to get some information from the local cable company about my bill. I couldn't understand the different groupings of channels which had no explanation, just names like Extended Package. She couldn't explain it and kept naming the same channels in different groupings. I said, very politely, "I don't understand your explanation; is there someone else who can explain it to me so I will understand it?" She replied, "You're stupid." Then she hung up.

— *Quoted from Kate Nasser, "The 25 Worst Customer Service Stories to Train the Best CSRs," The Smart SenseAbilities Blog, [www.KateNasser.com](http://www.KateNasser.com).*

Participants at the 2016 APPA Thought Leaders symposium believe higher education facilities organizations can do more. They can deliver an exceptional customer experience by engaging their staff and remaking their organization. They can create a culture of commitment to the purpose of the institution, one in which a focus on the customer and institutional mission drives decisions.

A tall order? Certainly. But not an impossible one, given a dedication to hard work, focused leadership, a systems approach to processes—with appropriate enabling tools—and training-enabled employee empowerment. Higher education facilities organizations are replete with fantastic individuals who step up and change the lives of their customers entirely on their own initiative. Organizations can and do **create cultures** in which the customer experience is prioritized. According to experts consulted for this report, outstanding service organizations create offerings, funding strategies, systems, and cultures that set their people up to excel *casually*.

Remaking the facilities organization with a focus on the customer experience will require institutions to look carefully at the culture they have created, since that's where the customer experience begins. Experts warn that starting with a list of customer service strategies is a short-term fix that almost inevitably fails. "I cringe when I hear an organization say this year they're going to put a new emphasis on customer service," expert Robert Spector, author of *The Nordstrom Way to Customer Service Excellence: The Handbook for Becoming the "Nordstrom" of*



*Your Industry*,” told APPA. “That’s like being in a relationship and saying, ‘This year I’m going to put a new emphasis on loving my partner.’”

Customer service shouldn’t be the next new management fad, the “flavor of the month,” Spector insisted. “Customer service is not a strategy. **It’s a way of life**,” he said.

Focusing on the customer shouldn’t be a program—it should be a culture shift. The good news about remaking your entire culture? The benefits extend **far beyond customer satisfaction survey results**. Facilities organizations with a customer-centric culture benefit in many ways, including streamlined processes, empowered and engaged staff, improved stewardship of campus resources, and loyal, enthusiastic customers who raise the status of the facilities organization on campus.

A woman’s 89-year-old grandfather got snowed in a couple years ago and didn’t have much in the house for meals. His daughter called several markets in the area to see if any of them had grocery delivery services, but the only one that said they did was Trader Joe’s. They don’t, actually, but were willing to help out this World War II vet. As the man’s daughter placed an order, the Trader Joe’s representative on the phone recommended other items that would be good for her dad’s low-sodium diet. An up-sell, you may be asking? Nope. They didn’t charge her a dime for the delivery or the groceries.

– Stacy Conradt, “11 of the Best Customer Service Stories Ever,” *mentalfloss.com*, December 15, 2015.

For the 2016 APPA Thought Leaders symposium, experts in customer service joined senior facilities officers as well as leaders in academics, finance, human resources, hospitality, and student affairs to analyze how the customer experience, both good and bad, drives customer loyalty. Participants sought to **identify the drivers behind customer service excellence**—to pull back the curtain and see what goes on behind the scenes at an exceptional customer-centric organization.

Participants then focused on the challenges facing colleges and universities and discussed the benefits a customer focus brings facilities organizations. Finally, the group examined the four core competencies of the facilities organization. They developed specific goals for **improving the customer experience and remaking the culture** in general administration and management; operations and maintenance; energy and utilities; and facilities planning, design, and construction.

The purpose of this report is both to inform readers and to prompt discussion on campuses. Senior facilities officers rely on the annual Thought Leader publications to generate new ideas about the built environment and institutional alignment. We encourage you to share this report widely across your institution and to discuss it within your department. We hope it sparks new ideas about remaking your organization to meet the challenges of higher education in the 21st century and encourages you to **create a culture that is customer-centric and engages your employees to deliver the exceptional**.

Author and business consultant Peter Shankman was getting ready to board a flight that was the last leg of a long day of traveling. It just happened to occur over dinnertime, and he knew he would be starving when he deplaned and headed home. So he tweeted, “Hey, @Mortons—can you meet me at Newark Airport with a porterhouse when I land in two hours? K, thanks. :)” Then he turned off his phone. Shankman said later, “Let’s understand: I was joking. I had absolutely no expectations of anything from that tweet. It’s like how we tweet, ‘Dear Winter, please stop, love Peter,’ or something similar.” Imagine Shankman’s surprise when he got off the plane to find a tuxedoed gentleman holding a bag that contained a 24 oz. Morton’s porterhouse, shrimp, potatoes, bread, napkins and silverware. Shankman noted that the tweet had to be noticed by Morton’s, someone had to get approval for the idea, a cook had to make his food, the food had to be driven 23.5 miles to the airport, and someone had to track down his flight information and figure out where he was landing to meet him at the right location. All while his stomach was grumbling on a 2.5-hour flight.

– Adapted from Stacy Conradt, “11 of the Best Customer Service Stories Ever,” *mentalfloss.com*, December 15, 2015; and Peter Shankman, “The Greatest Customer Service Story Ever Told, Starring Morton’s Steakhouse,” *shankman.com*, August 17, 2011.

Here’s the thing about great customer service: It doesn’t have to be as flashy as a guy showing up in a tuxedo and carrying a porterhouse steak, although that is impressive. It can be a genuine smile and a sincere thank-you. Great customer service can take the form of a supervisor listening to someone who just needs to be heard or a colleague

refilling a glass of iced tea on a hot day or a warm cup of coffee on a cold one. It can be a groundskeeper who takes pride in the roses or a custodian who makes the bathrooms smell fresh.

One participant at the Thought Leaders symposium told a story about the law school on his campus. The school has a tradition where the graduating class nominates an honorary class member who has made a significant difference in the lives of students. This individual is recognized at graduation and receives the same class ring as the students. Usually, the award goes to one of the law school professors. But one year, the class honored someone out of the ordinary: one of the custodians. The woman cleaned the law building, and she was a warm and welcoming presence to hard-working students. She had become “kind of the class mom,” the participant said. And at the end of the year, they recognized her for her contribution to the class.

That custodian took pride in her work, was empathetic, and was committed to these students and this institution. Undoubtedly, there are many more facilities professionals just like her going about their business in facilities departments across North America, delivering exceptional customer experiences every day. However, most don’t receive these sorts of accolades at the law school graduation. Yet they make an impact on the lives of students, faculty, administrators, and our campus communities.

Find those people within your organization. Nurture them. They are the flash point for transformation that will remake the facilities organization and create a culture of commitment and engagement that will withstand the challenges faced by higher education in the 21st century.

## Section 3:

# Understanding the Characteristics of the Best—and the Worst—Customer Service Organizations

Most of us immediately recognize excellent customer service when we experience it, but few of us spend enough time thinking about what goes into that experience. In fact, superior customer service doesn't happen by accident. It's the product of strategic decision making, smart policies, and targeted training by organizations that have discovered how to transform their cultures.

Senior facilities officers at higher education institutions must be part of the strategic thinking process that leads to decisions and policies that result in superior customer service. It's not enough to tell higher education facilities organizations that they must improve their customer service. Instead, senior facilities officers need a clear understanding of the elements of both good and bad customer service so they can implement the training, practices, and cultural changes that will create and reinforce service excellence and drive customer loyalty.

With this goal in mind, participants at the Thought Leaders symposium approached the concept of customer service from multiple angles. They drew on examples from their own experiences and from those of leaders in other industries. Then, they sorted through the stories and experiences for key lessons—lessons that were then validated with input from customer service experts. The result was a productive crash course in creating (and re-creating) exceptional customer experiences.

### Bad customer experiences: Lessons learned from failure

Every consumer has endured bad customer service—service that annoys, offends, inconveniences, or even harms customers. Such experiences may be painful, but they are also instructive. That's why participants at the Thought Leaders symposium began their examination of improving higher education facilities organizations by analyzing

customer service failures. They looked at what goes wrong to understand what *should* go right.

What emerged from the discussion were four main characteristics of poor customer service:

#### 1. Ineffective communication—both internally and externally.

When different departments and individuals within a company aren't communicating, it's the customer who suffers. One symposium participant told the story of trying to set up satellite TV service and getting different prices from different people in the company; what's more, he was accused of lying when he insisted on the price he had been assured he would get. Communication can also break down between customers and organizations, leaving customers feeling betrayed. For example, when an airline changed its policies without informing one Thought Leaders participant, he was left without recourse—and felt betrayed. "I told them I had been a loyal customer for 10 years, and their response was, basically, 'So?'"

#### Questions for Reflection:

How do you communicate with customers?

Who is responsible for customer communications?

How do you assess the effectiveness of your communications?

#### 2. Rigid, inflexible policies.

Every organization needs rules and regulations to guide employees' actions, but some people get trapped by policies that just get in the way. This was the experience of

a symposium participant who was the victim of identity theft involving the U.S. Internal Revenue Service. Resolving the problem took months, and every path to a solution seemed blocked. “It was like being stuck in a black hole,” said the participant. “It was a nightmare—I felt so helpless.”

### Questions for Reflection:

Do your employees understand the purpose of your policies?

How much do you empower your employees to interpret your policies to solve customer problems?

### Data Point:

#### The importance of flexibility

##### *How strict policies ruin the customer experience*

How do you feel when you see a sign that reads “Absolutely No Returns”? When I see it, I take my business elsewhere. The sign tells me the company is inflexible and unwilling to take the time and energy to listen to my complaints.

I once exchanged a printer at an office supply company, only to find that it used different ink cartridges from the ones I’d bought for the previous model. I called and asked if I could return my unused cartridges. I was told I could, but when I got to the store, they said I could have only a store credit or a gift card. No cash. No credit card refund. Why? Because that’s their policy. And why is it their policy? The person at the desk had no idea, and that’s exactly my point. The shortsighted folks at corporate headquarters hadn’t given her the flexibility to stray from their rigid policy—even when it meant potentially losing a customer. They didn’t even give her the information to explain why she couldn’t.

— Lee Cockerell, *The Customer Rules: The 39 Essential Rules for Delivering Sensational Service* (New York: Crown Business, 2013).

### 3. Lack of a customer service culture.

Some organizations seem not to put a high value on the customer’s experience—and it shows. A straightforward purchase of an armchair dragged one Thought Leaders participant into a confusing and chaotic mess: weeks without communication, delivery trucks arriving at nine o’clock at night without warning, employees unable to communicate in the customer’s language, and phone calls unanswered by the original store. “The entire process was broken,” said the customer.

### Questions for Reflection:

Are there processes in your organization that you know need fixing?

What is getting in the way of acting to improve those processes?

### 4. Lack of empathy, compassion, or concern.

When the family of one Thought Leaders participant gathered for a reunion, their enjoyment was cut short when one family member suffered a back injury and could hardly move. Being strangers to the city, all they could do was ask the hotel staff for help, but it seems the staff couldn’t care less. “We had no idea where to go for help, short of calling 911,” said the participant. “And no one at the hotel seemed to care. It wasn’t their problem.” What bothered the family the most, he said, was the lack of basic empathy for someone in pain.

### Questions for Reflection:

Do your employees care about their customers? How do you know?

### Excellent customer experiences: Principles of success

For most symposium participants, it was easy to bring to mind negative customer service experiences and much harder to recall positive ones. (This is a lesson in itself: Customers are more likely to recall bad experiences than good ones.) However, digging into the details of positive experiences can shed light on how organizations successfully satisfy their customers.

Participants identified three main characteristics of excellent customer service organizations:

### 1. The organization's culture and leadership prioritize the customer experience.

Some organizations have a well-earned reputation for prioritizing customer experiences. Nordstrom, for example, has remained successful by making its brand synonymous with customer service excellence. One participant at the Thought Leaders symposium experienced that excellence for herself when the store tracked down a dress that she had seen in a magazine. Nordstrom had sold out of the dress, but the sales staff located it from a competitor, bought it for full price, sold it to the participant for the Nordstrom sale price, and sent it straight to her door. "They've really got the customer service thing down," said the participant.

This sort of excellence only comes when companies build customer service into their entire operating culture. The importance of delighting the customer is emphasized at every level at Nordstrom, reinforced in training, and commended in company communications. So ingrained is the concept that when two customers showed up at a distribution center in Iowa, mistaking the center for a store, the staff welcomed them, sat them down at a computer with the Nordstrom website, and encouraged them to pick out what they wanted so it could be retrieved from the warehouse. "Those employees easily could have said, 'That's not our job. Good luck, go on your way,'" customer service expert Robert Spector told APPA. Spector, the author of *The Nordstrom Way*, has studied Nordstrom's methods for decades. Distribution center staff never interact with customers—their job is to ship merchandise around the country. But so deep is the commitment to service at the company that the distribution center staff found a way to satisfy their customers' needs.

#### Questions for Reflection:

Does your organization have a stated goal to make the customer happy, within the financial constraints that all organizations have? Could you make this a goal?

#### Data Point:

#### Questions raised by bad service

#### Why is service so bad?

Good service is still, for the most part, rare. In our experience as economic actors, in industry across industry, we're increasingly frustrated and disappointed. Customers, employees, owners—no one wants to deliver bad service, and no one wants to endure it. But that's the experience we continue to inflict on each other.

Why is that? . . . Why is service so hard to get right, despite the fact that we're wired for it?

Here's what we've learned: Uncommon service is not born from attitude and effort, but from design choices made in the very blueprints of a business model. It's easy to throw service into a mission statement and periodically do whatever it takes to make a customer happy. What's hard is designing a service model that allows average employees—not just the exceptional ones—to produce service excellence as an everyday routine. Outstanding service organizations create offerings, funding strategies, systems, and cultures that set their people up to excel casually.

— *Frances Frei and Anne Morriss, Uncommon Service: How to Win by Putting Customers at the Core of Your Business (Boston: Harvard Business Review Press, 2012).*

### 2. Policies and processes promote the customer experience.

It's not enough to promote good customer service; institutions must craft systems that prioritize the customer experience and minimize procedural roadblocks. One organization noted for its customer service ethos is the insurance company USAA. A symposium participant cited the company for its lack of bureaucracy—an unusual quality in an insurance company. In fact, USAA constantly looks for ways to adapt its policies to meet the needs of its customers.

Since the bulk of USAA clients are members of the military and their families, the needs of these customers are unique—but USAA understands them. It heavily discounts car insurance rates when clients are deployed overseas, for example, and was among the first adopters of mobile banking technology, allowing users to deposit checks by smartphone—an extraordinary convenience for troops stationed in Afghanistan or Iraq. The company has paid particular attention to customer service phone calls, one of the most frustrating experiences for most consumers. (One survey of 1,000 customers conducted by the Arizona State University W.P. Carey School of Business found that 68 percent reported feeling “rage” during a phone call with a customer service representative.) Call centers are driven by metrics, with most measuring call times down to the split second and imposing strict consequences for employees who can’t keep their calls short. For USAA, however, the only metric that matters is customer satisfaction.

### Questions for Reflection:

When was the last time you reviewed your policies and procedures with an eye on their impact to the customer?

Could you ask your employees for their feedback on this topic?

### 3. Employees demonstrate key traits behind customer service, such as empathy, compassion, initiative, and flexibility.

Many of the most emotional stories about customer service experiences concern individuals who have gone above and beyond to help. One Thought Leaders participant described the behavior of the custodians in a university building that was being occupied by a student protest. Despite the tense situation, the housekeeping staff decided it was important that the building stay clean and functional, especially with the students sleeping on the floors and using the restrooms to clean up. The staff even came in over the weekend to keep the disorder under control. Those on both sides of the protest deeply appreciated the efforts of the housekeepers, who saw the protesting students not as troublemakers but as human beings who deserved clean restrooms.

Experts agree that customer service comes down to people interacting with people, and the people who represent your organization need certain traits for your efforts to succeed. Micah Solomon, Forbes.com contributor and author of multiple books on customer service—including, most recently, *High-Tech, High-Touch Customer Service*—highlights five characteristics:

- **Warmth** – Simple human kindness.
- **Empathy** – The ability to sense what another person is feeling.
- **Teamwork** – An inclination toward “Let’s work together to make this happen” and against “I’d rather do it all myself.”
- **Conscientiousness** – Detail orientation, including an ability and willingness to follow through to completion.
- **Optimism** – The ability to bounce back and not internalize challenges.

Solomon emphasizes that you can’t train staff to have these traits. “You can *sort of* teach people to smile, *sort of* teach them to favor teamwork. But it’s really hard if you don’t start with people inclined this way,” he writes in his *Forbes.com* article “How Hospitality and Customer Service Experts Hire for Customer Service Positions.” As the article title suggests, you must be deliberate about prioritizing customer service traits when hiring so you have the right staff on board.

### Questions for Reflection:

If you are the senior facilities officer, how often do you interact with staff at all levels of the organization?

Do members of the organization at all levels have a sense that the senior facilities officer is engaged and involved in the department and is dedicated to encouraging staff to provide a great customer experience?

Have you included customer service traits in your repository of interview questions?

**Data Point:****The Customer Experience***Showing customers you care*

About 15 years ago, I was staying with my family at a resort in Hawaii. My daughter lost her ring in the pool, and so I asked the pool staff to keep an eye out for it. I was pleased when I overheard the pool staff talking to the grounds crew asking them to look out for it as well. The next day, the staff called me by name (I had only given them my room number) and said they were still looking for it. They found the ring the next day and brought it to our room.

This was an example of great hospitality, and they seemed to really care about what could have been a minor thing.

—John P. Morris, Associate Vice President, Facility Services, Northern Arizona University, Flagstaff, Arizona

**Best practices from different industries**

Consumer experiences provide a basic framework for thinking about customer service, but for a richer understanding we can look to industries focused on consumer experiences. APPA is grateful for the unique insights of Michael Bills and William Blodgett, who provided subject-matter expertise at the Thought Leaders symposium. Bills is director of human resources at JW Marriott Desert Springs Resort & Spa in Palm Desert, California; Blodgett is director of hotel operations at JW Marriott Starr Pass Resort & Spa in Tucson, Arizona.

**Know your customers, and pay attention when their needs and expectations change.** Customer needs change, and organizations must adapt along with them, according to Blodgett. High-end hotels, for example, have long prided themselves on the personal touch—a smiling clerk at the check-in desk and a knowledgeable concierge who can help with reservations at memorable restaurants. However, Millennials, the generation born after about 1980, prefer to do things for themselves online and avoid these sorts of personal interactions. “They

don’t want to talk to the concierge. They want to check in online without talking to a clerk,” said Blodgett. “They want things on their terms, and they’re forcing us to innovate.” Marriott is listening to its customers and seeking to rapidly introduce new services that will appeal to this generation. “We have to be deliberate about innovating or risk being irrelevant,” said Blodgett.

The critical lesson is that organizations must understand their customers. USAA, for example, retains military customers because the company understands their unique challenges. In addition to hiring veterans and military spouses to bring first-hand knowledge of military life into the organization, USAA has introduced company training for new hires that includes donning Kevlar vests and dining on MREs (Meals, Ready-to-Eat), which troops consume in the field. The goal is for every employee to appreciate the pressures their customers face and to keep on top of changing needs.

**Questions for Reflection:**

How do you keep informed about the ever-changing student culture? Or the evolution of teaching strategies used by faculty?

**Make smart use of social media.** Social media has been a mixed blessing for customer service organizations. The Millennials in particular don’t hesitate to make their opinions known in the most public ways possible. “They will go on social media and slam you,” said Blodgett.

Organizations will live or die based on their social media strategies; what’s more, when they die, it’s public and humiliating. In one excruciating incident, pizza manufacturer DiGiorno tried to exploit the success of the Twitter hashtag #WhyIStayed, in which women explained why they found it difficult to leave their abusive partners. Women didn’t find it funny when DiGiorno posted, “You had pizza.” Also painful was the photo posted by an American Apparel employee on the Fourth of July. The employee thought it depicted fireworks; in actuality, it was an image of the Space Shuttle Challenger explosion that killed seven people in 1986.

One response to such customer service catastrophes is to ignore social media completely, but organizations do this at their own peril. Not only does this make them seem out of touch and unengaged, but they are also shutting off an invaluable line of communication with their customers. Some 23 percent of adults online currently use Twitter, a statistically significant increase compared to the 18 percent who did so in August 2013. Twitter is particularly popular among those under 50 and the college educated. In addition, 82 percent of adults online ages 18 to 29 use Facebook. Marriott relies on feedback from Twitter and Facebook as well as review sites such as Yelp and TripAdvisor. The company uses aggregation software that seeks out mentions and reviews and funnels data to staff such as Blodgett, who receives hourly updates. As a result, Blodgett knows exactly what his customers like and don't like. When his hotel tries something new, the feedback is instantaneous and hassle free. With social media, Marriott doesn't have to ask its customers what they want, the company just needs to be responsive to what customers are saying.

### Questions for Reflection:

Is your facilities organization using Twitter?  
Facebook?

How could an active and engaged social media presence help your facilities organization connect with students and other customers?

**Fine-tune workforce development to promote customer service.** Excellent customer experiences don't begin when the customer walks in the door. They start when new employees are hired and trained by their organization. Finding the right people to interact with customers and giving them the proper education is critical. **"As you develop a culture of service, don't leave anything to chance,"** said Marriott's Blodgett. In addition to seeking out employees with personalities suited to their positions (front-desk staff, for example, must be extroverts), Marriott conducts training that goes beyond the task at hand. "I'm teaching the technical skills of running a front desk, but I also need to teach what luxury service is like," Blodgett said.

### Data Point:

#### Social media strategy

#### *Be careful what you wish for*

Many organizations have found success with social media campaigns that encourage customers to post photos or pose questions. When done well, these campaigns help organizations engage with their audience; however, when executed poorly, they're opportunities for embarrassment.

- The Chicago Transit Authority hosted a Twitter Q and A with the transit fare card company Ventra using the hashtag #AskVentra. The plan backfired when annoyed transit riders tweeted a barrage of disparaging comments about the system.
- A similar campaign with Sea World erupted into a firestorm when the company-sponsored hashtag #AskSeaWorld was overwhelmed with angry questions from animal activists.
- The New York Police Department public relations staff hoped to create good feelings about community policing when they asked Twitter users to post photos of themselves with NYPD officers under the hashtag #myNYPD. They were appalled when instead of smiling group shots, they received disturbing images of alleged police brutality.

The takeaway? Social engagement works when the organization has a good relationship with its audience. Simmering resentment between an organization and its customers can ignite into full flame by a poorly timed social media campaign.

For online retailer Zappos, hiring, training and workforce development are central to its customer service efforts, which are widely recognized as among the best in the business. Zappos rigorously screens employees, who must undergo two interviews, one for technical skills and one for company culture. If employees can't live up to the company's 10 core values, they don't make the cut—and Zappos is highly selective. (Zappos compares its hire rate to Harvard's acceptance rate—about 1 percent.) Once hired, all employees—and that means all employees, including senior management—must participate in



four weeks of training that emphasizes the company's unique culture and management approach. All employees are trained to answer customer calls and must work shifts at the call center, even if their job has nothing to do with customer service. So seriously does Zappos take the process that the company gives new hires the opportunity to walk away. In fact, Zappos will pay new hires around \$4,000 to leave if they don't feel they're a good fit for the organization. It's an unprecedented step for a company, but Zappos believes it's more important to hire staff who embrace the company's values than to "contaminate the culture" (the actual phrase used by Zappos) with employees who aren't fully committed.

### Questions for Reflection:

Does your hiring process include an assessment of the "soft" skills needed to provide an exceptional customer experience?

What about your training process? Do you train new hires to interact with customers, understand customer needs, and provide a superior experience?

**Identify and implement service standards to track and improve customer service.** Some of the most successful customer service organizations place metrics at the heart of their efforts and have developed creative ways to track their customers' impressions. JetBlue, for example, was founded with the goal to "bring humanity back to travel," and the airline measures how well it's succeeding with a sophisticated survey system that asks customers to grade every aspect of their experience, from making a reservation to retrieving their bags. Survey results are correlated with operational data. This information is then channeled throughout the company, with the COO receiving big-picture analysis and flight attendants given feedback on customer compliments.

One of the greatest challenges in creating a measurement system is in deciding what to measure. Search online for "customer service metrics," and the first few pages offer articles with a bewildering number of metrics. In fact, each organization must determine the essential elements to measure based on its priorities.

Some organizations make the mistake of trying to measure too much, however. In their book *Outside In: The Power of Putting Customers at the Center of Your Business*, customer service experts Harley Manning and Kerry Bodine describe how FedEx created its customer experience metrics. The delivery company started by identifying the "touchpoints" where the organization interacts with the customer—for example, arranging for package pickup, checking expected delivery time online, and receiving a package at your door. FedEx initially identified roughly 250 customer touchpoints, far too many to measure effectively. The company had to focus in on the touchpoints used most often and with the most significant effect on the customer's experience.

Metrics can go beyond problem solving to significantly improving the customer experience. Zappos, for example, measures what it calls the "happiness experience" for all its calls, asking, "Did the agent try to make a personal emotional connection?" and "Did they provide a 'wow experience'?" Building these questions into the company's metrics allows Zappos to promote the enhanced customer experiences the company seeks to provide.

### Questions for Reflection:

How do you measure the customer experience?

What standards are most important to your organization? How do you know if you're meeting those standards?

**Empower employees to make decisions and take initiative.** Few statements are more infuriating to a customer than an employee saying, "I can't do that." Clearly, sometimes employees can't do what customers want, especially if health and safety are on the line; in fact, the customer isn't always right. However, often employees are limited by organizational policies that get in the way of great service.

Organizations known for excellent customer service empower employees to meet customer needs. Nordstrom, for example, makes its policies as simple as possible. Its employee handbook states, "Use good judgment in all situations." That's it. Employees are allowed and encouraged to do whatever they consider necessary to

**Data Point:****The Customer Experience***Hiring for commitment and willingness to get the job done*

The Air Force Academy has contractors in charge of the custodial needs of the largest residence hall in America—with more than 2,000 cadets. They repeatedly had poor service. Finally, they gave Goodwill the contract. More than 400 disabled people took over custodial duties.

They were the most responsible, loyal custodians ever, and the cadets loved them. They provided great customer service. The lesson is that it's dedication and willingness to do your best that makes the difference.

—A 2016 Thought Leaders symposium participant

satisfy the customer. This policy of empowerment has kept Nordstrom successful through the ups and downs of more than a century in business.

**Questions for Reflection:**

How much individual authority do your employees have?

Do any of your policies get in the way of empowering employees to provide exceptional experiences?

**The big picture: Essential characteristics of excellent customer service organizations**

Combining insights from personal customer service experiences with lessons learned from other industries, participants at the Thought Leaders symposium synthesized what they learned into a list of the essential elements of creating exceptional customer experiences.

**Culture and leadership: The organization's culture and leadership make the customer experience a priority.**

**Data Point:****Employee autonomy***Why employee empowerment matters*

Employees selected, oriented, and reinforced properly, surrounded by peers of the same caliber, will thrive when given significant autonomy. Otherwise, they'll wither. There are dozens of studies to support this, inside and outside of business life.

You want customer relations to be on the shoulders of your employees. But as long as you're defining every little thing, and rewarding/punishing based on seemingly arbitrary and thus, inevitably, gamed criteria, you won't get them to carry that responsibility. Their viewpoint will soon resemble the jaded flight attendant's attitude on a big legacy carrier who told me the other day, "The more emphatically Management comes up with new i's to dot and t's for me to cross, the less seriously I take them. I know these rules will be gone within the year, and a new group of regs will take their place."

—Micah Solomon, "How Ritz-Carlton and Four Seasons Empower Employees and Uphold Customer Service Standards," Forbes.com, October 28, 2013.

An exemplary customer experience begins long before the first customer interaction. It starts with a core belief that customers matter, that their experience should be positive, and that making people happy is critical to the organization's success.

Key elements of this philosophy include the following:

- **Customer service culture starts at the top.** If senior leaders don't believe in customer service, neither will frontline staff.
- **The value of customer service is communicated—and communicated often—to all employees on every level.** It's not enough to say it once. The message has to go out day after day.
- **The institutional mission includes—or is consistent with—excellent customer service.** Organizations can have many goals—to maximize profits, create the best technology, or provide a first-class education. If the

user's experience isn't part of that mission, it will be difficult to make user experience a top priority.

- **Resources are available to support customer service efforts.** Employees know when a goal is all talk and no action: They see it in how the organization invests its time and money. If nothing is put toward improving the customer experience, employees will spend little effort on it themselves.
- **The organization knows who their customers are and what they want.** The most successful customer service companies know the ins and outs of their customers' lives, understand their problems, and appreciate their points of view.

## Questions for Reflection:

How would you characterize your organization's culture? Is it truly customer-centric, or is the focus elsewhere?

How do you create a culture in which a highly skilled employee with decades on the job wants to create an exceptional experience for every customer, even the 18-year-old newly arrived on campus?

**Policies and processes: The organizational structure and policies of the organization promote customer service.** Core beliefs about customers are only beginning concepts; these beliefs are put into action with policies about hiring, management, and metrics. According to experts Manning and Bodine, effective organizations create a highly functional "customer service ecosystem"—that is, a web of relationships and touchpoints that determines the quality of all customer interactions.

Key elements of a successful customer service ecosystem include the following:

- **Customer service is emphasized from the beginning of the hiring process through training, mentoring, and professional development.** Remember the words of Marriott's Blodgett: "As you develop a culture of service, don't leave anything to chance." Start from day one to get the right people on board, and never stop training them.

- **Processes are in place to seek customer feedback and note customer experiences on social media.** It's impossible to know what customers are experiencing without asking them.
- **Employees are empowered to solve problems, encouraged to take initiative to satisfy customers, and rewarded for innovative ideas.** Successful companies trust their employees to use good judgment and reward them when they demonstrate ability and success.
- **Policies are transparent to customers and employees, and employees know when they can bend the rules and when the rules are firm.** Even companies with the greatest reputation for employee empowerment still have rules. Southwest Airlines may give its staff significant flexibility in handing out free drinks, but Federal Aviation Administration rules are fixed—and everyone knows it.
- **The organization keeps customer service in mind when planning for emergencies and develops crisis plans that include communication components.** A crisis can either expose an organization's weaknesses or shine a spotlight on its strengths.

## Questions for Reflection:

Which policies in your organization are nonnegotiable, and which have more room for individual judgment? Do your employees know the difference?

**Behaviors and traits: Employees demonstrate key traits behind great customer service.** Training can turn a promising customer representative into a superb customer representative, but it can't work miracles. Without a certain level of commitment, efforts to improve service will only go so far.

That doesn't mean that every employee needs to be an extroverted service whiz. It does mean that employees should demonstrate at least these essential characteristics:

- **Ownership.** Employees take responsibility. They take pride in their work and in the mission of the organization.

- **Initiative.** Employees feel empowered. They don't ignore problems that aren't specifically theirs. They think creatively about the operation of the organization. In the 1980s, Toyota revolutionized the assembly line by allowing any worker to stop production when he or she saw a problem. That level of trust enabled the company to significantly improve the quality of their final product while increasing employee morale. It's a lesson every organization can learn.
- **Mission and stewardship.** Employees embrace the mission of the organization. They have a sense of stewardship toward the resources of the organization and make the most of the trust granted to them. Organizations need employees who embrace the mission and see themselves as part of the big picture.
- **Empathy.** Employees understand the perspectives of customers and other stakeholders and act with compassion and concern. Often, all a frustrated customer really needs is a sympathetic and heartfelt "I'm sorry." Connecting on a human level takes customer service from rote interaction to meaningful exchange.

### Questions for Reflection:

Do you consider the traits listed above when hiring new staff?

Do you emphasize these traits in your training?

### Data Point:

## Employee empowerment and commitment

### *Owning a problem to resolution*

A woman customer was shopping at the Nordstrom store at the South Park mall in Charlotte, North Carolina. It was near closing time. She tried on some clothes, made some purchases, and went directly home. That night, before going to bed, she discovered that a 2.8-carat diamond from her wedding ring was missing. She assumed that she lost the diamond at Nordstrom.

The very next morning, she came to the store when it opened and headed over to the women's department, where she had last been. She got down on her hands and knees, searching for the diamond.

Eric Wilson, the loss prevention agent for the store, noticed the customer crawling on the floor and asked how he could help. After she explained the situation to him, Eric got down on his hands and knees and joined the search. No luck. He took the customer's contact information and told her he would follow up.

Eric then contacted two employees in building services, Bart Garcia and Tom Fraley, who joined in the search. Again, no luck. Perhaps the diamond was in one of the vacuum cleaner bags? They gathered the vacuum bags and began splitting them open and sifting through the dirty contents. Eventually, voilà! They found the diamond.

Clearly, Eric Wilson took the initiative. His job description did not include scrutinizing full vacuum cleaner bags. He could have told building services about the lost diamond and then moved on with his tasks for the day. But the customer wanted someone to find her diamond. Eric owned the situation. He figured the best approach to solving the problem and made a difference in a person's life.

– *Robert Spector and Patrick McCarthy, The Nordstrom Way to Customer Service Excellence: The Handbook for Becoming the "Nordstrom" of Your Industry, 2nd ed. (Hoboken, NJ: John Wiley & Sons, 2012).*

## Section 4:

# Transforming the Higher Education Facilities Organization

### Why the customer experience matters to higher education facilities leaders

Most colleges and universities do not traditionally think of themselves as being in the business of customer service. Faculty still resist the concept, arguing that students should not be thought of as customers (because students are definitely *not* always right). To be clear, we are not suggesting the classroom or laboratory is the place for consumerism. On the other hand, **college and university staff unquestionably provide consumer services**—from processing invoices to maintaining the electrical grid. Institutions face increasing pressure to improve those services.

Facilities organizations provide myriad services to their institutions, and the quality of those services *can be improved*. Response times can be shortened, communications expanded, and standards raised. In ways both large and small, the care and attentiveness of staff can be enhanced. Multiple benefits flow from these improvements. Stakeholders across the institution increasingly value the facilities organization. The mission of the facilities organization better supports the mission of the institution. Operations become more streamlined, efficient, and effective.

Most critically, a focus on the customer experience is really a focus on creating a engaged workforce and a culture of commitment. **Customer loyalty is the product of an organization deeply motivated by a sense of higher purpose. Every person on the team feels they are part of something greater than themselves.**

A team with that level of commitment and engagement is the most powerful tool the facilities organization can have.

### Questions for Reflection:

Is there resistance in your organization to considering your work in terms of customer service or the customer experience?

### Data Point:

#### Customer service in higher education

##### *The language question*

In the book *Creating a Service Culture in Higher Education Administration*, authors Mario C. Martinez, Brandy Smith, and Katie Humphreys state:

We won't get caught up in the language of "customer," "client," "customer service," or any other such words. What's important are the concepts. We will tend to stay with the language of customers and service since these words still, for the most part, denote an emphasis on effective interaction with colleagues and those outside your immediate office environment who come to you for help (e.g., students, parents, and faculty).

Participants at the 2016 APPA Thought Leaders symposium adopted a similar attitude: focusing on improving interactions between facilities organizations and their stakeholders without worrying about the finer points of the language of customer service. The fact is that facilities organizations must respond to demands from stakeholders to improve their operations across the board.

## Creating a customer-centric culture provides a framework for driving change in facilities operations

In fact, higher education facilities staff *are* in the business of customer service. Families choose which college or university to attend based on many factors, and the quality of facilities influences these factors. Customer service expert Robert Spector told APPA:

If the people who take care of facilities don't do their job, then if I'm a parent taking a kid to visit schools and I see that the grass isn't mowed or there's garbage everywhere, I'm going to have a negative opinion of that campus. I'm going to wonder that if they're missing these details that I can see, what details are they missing that aren't in plain sight?

The relationship between facilities staff and stakeholders isn't as simple as that between a salesperson and a customer, but the connection is still there. Spector, author of *The Nordstrom Way*, pointed out that customer service at Nordstrom is only partially the responsibility of the frontline sales staff. "Customer service at Nordstrom is determined by the **people the customer never sees**. It's those people who clean the floors, keep the lights on, display the merchandise, and make sure products get there in time." Spector added, "Even though you are not directly involved with the customer or the end user, you as a team player are just as responsible for that experience."

This message was echoed by Lee Cockerell, former executive vice president of operations for the Walt Disney Worlds Resort and author of *The Customer Rules: The 39 Essential Rules for Delivering Sensational Service*. Cockerell told APPA:

Everything matters if you want to be great. At Disney we know that poor facilities, maintenance, cleanliness, and quality of construction comes into the way a guest/customer rates us and rates their intent to return. **You must have a culture where everyone in the organization is thinking about and practicing excellence.** Reputation matters, and first impressions matter in selection of any product, including which college to attend. We make sure everyone at Disney understands their role in the show so we can perform

a perfect show day in and day out. Everyone must understand that their role eventually leads to a good or a poor customer experience. If maintenance does not maintain the AC unit in December, it will break down in May—and maybe even during commencement exercises.

Disney approaches service at its theme parks as a performance, and its staff are divided into onstage and offstage cast members. Onstage staff includes anyone who interacts directly with park guests, such as the costumed figure of Mickey Mouse or the ticket taker at Space Mountain. Offstage staff includes those working behind the scenes, such as chefs, IT specialists, custodial staff, lighting technicians, and accounts payable supervisors. All must do their jobs well to create a complete performance.

A customer-centric mindset in the facilities organization supports higher education institutions by attracting and retaining students, impressing parents, and satisfying donors and governments that their funds are being well spent. A customer-centric mindset is also essential to meet the **demands of today's students**. Millennials have high expectations, and they voice their displeasure when they are disappointed. This may seem overly entitled or unfair to some of us, who may have attended school in the days when crowded dorm rooms, cold showers, and unappealing cafeteria food were part of the shared experience. Today's students—and their parents—demand excellence, and that's understandable. According to the College Board, the average annual cost to attend a U.S. public college or university in the United States is \$9,410, and nearly \$32,405 for private institutions, not including room and board; what's more, the most expensive schools cost more than \$50,000. At that price, it's not surprising that families expect comfortable, clean, modern campuses with generous amenities.

However, attracting and satisfying students is only the first of many benefits deriving from an emphasis on customer service. Expert after expert agrees that customer service is ultimately about culture. Superior customer service organizations **share a culture of commitment**—that is, everyone in the organization shares the same passion for excellence and dedication to a mission or set of goals.

**The central message of this report is that a culture of commitment can transform the higher education facilities organization and deliver exceptional service to customers. Excellent customer experiences never happen by accident—they are the product of a committed, engaged workforce and take root in a culture that is motivated by a greater sense of purpose.**

## Questions for Reflection:

Do the staff members within the facilities organization have a sense they are part of something bigger than themselves?

How can you as a leader promote the idea that the day-to-day work of the facilities organization is part of the heritage and mission of your college or university?

## Data Point:

### Service Story

#### *Demonstrating pride in your work and commitment to the institution*

When touring the campus of a large research institution, I was approached by the paint shop supervisor, who greeted me and explained what he was doing. He showed me plans and examples of his group's works before, during, and after completion.

He was very proactive and took pride in his organization and work. He gets the big picture and exemplifies the organization's great morale.

— Michael O'Connor, Physical Plant Director, Appalachian State University, Boone, North Carolina

## Benefits of a customer-centric culture for facilities organizations

An engaged and committed customer-centric culture can help the facilities organization achieve the following goals:

**Align the mission of the facilities organization with the mission of the institution.** When facilities staff feel

motivated by the mission and vision of the institution, their level of engagement and commitment can only grow. "Most people want to do a good job," said Spector. "And most people want to feel part of something bigger than themselves." It's up to leadership, Spector continued, to make clear the connection between the mission of the institution and the day-to-day work of running a facilities department.

**Understand the different customers of the organization and their needs.** Students are only the most obvious customer for higher education facilities organizations. Departments have many customers, both internally and externally, and understanding customers will help facilities organizations meet their needs.

**Analyze policies and processes, identify systems that get in the way of providing an excellent experience, and eliminate barriers.** Colleges and universities tend to be bureaucratic bodies with innumerable rules. Some of those rules, such as those concerning health and safety, are nonnegotiable. Other rules, however, exist out of expediency, from habit, or for the convenience of the facilities organization—not its customers. Facilities organizations should examine their rules to eliminate those that separate them from customers.

**Empower staff to take ownership of their work.** Empowerment is the theme of dozens of books on customer service. Organizations like to say they're empowering their employees, but few have the courage to truly trust employees to use their best judgment. A former human resources manager at Southwest Airlines told a story of a customer who was devastated when he missed his flight; he explained through tears to the ticket agent that his daughter was about to have a liver transplant in another city. The ticket agent immediately booked a chartered flight for the customer. The next day the agent was called to his manager's office and told he had overstepped—Southwest shouldn't have paid for the private jet. However, the agent had done his job by taking care of the customer and so he wasn't fired or even reprimanded. Southwest recognized that when you place trust in employees, sometimes they will go too far, and that's okay. The benefit of the employee saying "Let me see what I can do," is greater than the cost of saying "No." It's an opportunity for a "teaching

moment” essential for organizational continuous improvement.

**Improve the perception of the facilities organization throughout the institution.** A customer-centric culture has the potential to build goodwill toward the facilities organization throughout the institution. Every department within a college or university interacts with facilities staff on some level. What would it mean for facilities if these customers found working with the department fast, easy, and pleasant? Facilities staff could be heroes for department secretaries, lab managers, and anyone who ever got stuck in an elevator.

**Promote stewardship of campus resources.** Higher education operates on a longer time frame than most

businesses: Campuses are intended to last generations. The wisest among the facilities staff know they stand in a long line of caretakers who will, in time, pass supervision of these buildings and grounds onto the next generation. That sense of stewardship should be nurtured. A sense of the history and legacy of the campus and a commitment to passing it on in better shape than you received it is what Spector called feeling part of something bigger than ourselves.

### Questions for Reflection:

How can the leaders and managers within your facilities organization demonstrate a deep sense of stewardship toward campus resources?

### Data Point:

#### Finding a sense of mission

#### *Becoming part of something bigger than yourself*

Robert Spector has learned something in his time writing and speaking about customer service, and it isn't how to win at customer service—at least, not exactly.

“I've been out speaking all over the world to every kind of business about customer service,” he told APPA. “Talking about practices and strategies is such a transitory thing.” Spector has seen organizations in all sorts of industries decide to focus on customer service and quickly fall back into old habits. In his experience, adopting a list of tactics doesn't work, because customer service isn't about what you do. It's about who you are.

“If the members of APPA are really serious about this, then the question is ‘What is our culture? What do we stand for?’” Spector said. “The overall message is look within yourself and see what you stand for, what makes you different. What are your values?”

Values and mission give employees something to believe in, something to be part of. Spector said,

“People want to feel part of something bigger than themselves.”

It's up to leadership to make clear the link between each individual's day-to-day work and the mission of the institution. “If people in your organization don't feel there's a connection, they're not being told that what they're doing is crucial,” Spector said. “It's up to the leadership to communicate that everyone's job is important. Everyone's job is essential.”

Facilities leaders should look for opportunities to recognize those employees who are advancing the mission of the institution.

“If you feel like you're operating in a vacuum, you'll never have a larger sense of purpose,” said Spector. “That's where the administration comes in and finds ways to single out and recognize people who are engaged on behalf of the university. Everyone should feel part of something.”



## Section 5:

# Addressing APPA Core Competencies through Customer-Focused Transformation

*With a clear understanding of the benefits of a customer-centric focus for higher education facilities organizations, participants at the 2016 Thought Leaders symposium began to consider the implications of such a focus across the four core competencies that comprise the major responsibility areas of the facilities organization.*

### Opening lines of communication

A major theme of this part of the symposium centered on communication. Facilities organizations have traditionally focused on the (sometimes literal) nuts and bolts of operating buildings and campuses. Communicating what they were doing and why took a back seat to actually doing the work. This approach poorly serves the facilities organization today, however. Customers need information to understand and be satisfied with the service they are receiving from the facilities organization.

There are two main categories of communication: standard, everyday interactions and crisis communications. Standard communications include exchanges about the status of construction projects, progress toward resolving problems, and what to expect from preventive maintenance. Facilities organizations should consider all their day-to-day interactions with customers and determine how well they are communicating. Generally, customers want more information, delivered more frequently, and through more channels. For example, if your organization once created periodic newsletters detailing the progress of a construction project, consider moving toward daily updates on a dedicated Web page, plus posts on Facebook and Twitter.

Crisis communications must be even more frequent, thorough, and widely dispersed. Even if all you have to say is “We are aware of the problem and working on solving it,” get that message out. Continue updating customers regularly about your efforts; customers hate feeling like nothing is being done to resolve a problem

and want to know as soon as possible about further delays. Then, keep communicating through recovery efforts. One Thought Leaders participant described a catastrophic water leak that flooded a residence hall. He pointed to the importance of continuing communications with students and parents over the weeks following the crisis as the residence hall was repaired. Proving your commitment and concern during a crisis builds up your customers’ trust and fosters a sense of loyalty that lasts long after the crisis is over. Communicate early; communicate often!

### Questions for Reflection:

How do you communicate with customers about day-to-day operations? How many channels of communication do you use? How often do you communicate?

Do you have a plan in place for communicating in a crisis? For continuing that communication during crisis recovery, however long that takes?

### Addressing APPA’s four competencies

Symposium participants next considered their operations through the lens of APPA’s four competencies: general administration and management; operations and maintenance; energy and utilities; and facilities planning, design, and construction. Participants developed specific goals for each core competency and defined the steps needed to achieve these goals.

## Facilities planning, design, and construction: Ensuring new buildings fulfill customer needs

### The goals:

#### 1. Implement design standards that optimize total cost of ownership and support the institution's mission.

Just as institutions should adopt standards for operations and maintenance, they should also establish standards for new buildings. Defining these standards will require two-way communication between facilities and end users. Campus customers need to educate facilities about their needs and goals for new facilities. At the same time, facilities departments need to educate the institution about cost-effective and sustainable design and construction. In particular, senior facilities leaders need to promote the concept of total cost of ownership. The idea is simple: The cost of buildings includes not just initial construction but also long-term operations and maintenance, and eventual decommissioning and demolition. The smartest and most sustainable designs take total costs into account and make decisions that minimize expenses over the lifetime of a structure. In other words, the air-handling unit that costs more upfront may be easier to maintain and cheaper to operate over the long haul, and so it actually costs the institution less than a unit that is cheaper upfront but time consuming to maintain and costly to operate.

Establishing institutionwide standards that incorporate total cost of ownership helps colleges and universities accomplish multiple goals:

- Consolidate and organize institutional knowledge within the facilities department.
- Build a sense of campus identity with common architectural features and materials.
- Establish baseline sustainability standards.
- Streamline communications between the facilities department and contractors.
- Achieve economies of scale through standardized purchasing.
- Improve budget planning over the long term.

- Enhance institutional understanding of the value and contribution of the built environment to the institution's success.

#### 2. Create and integrate data systems to build consensus and improve decision making.

As college and university buildings grow more complex, the need for data-management systems increases. Institutions should take advantage of advanced systems for asset management, space utilization, energy management, and building maintenance—systems that only grow more powerful when their data is integrated and consolidated. Such systems allow colleges and universities to fine-tune the management of resources such as space. For example, a classroom that is only occupied for a few hours a few days a week is an ineffective resource, costing the college or university money. Institutionwide management allows campuses to make the most of the space they already have.

Clearly presented, consolidated data about the institution's facilities can be a powerful tool in building consensus and supporting decision making. Regarding the example of classroom space, an academic department may have the impression the campus is running low on classroom space and lobby for a new building. Space-utilization information could demonstrate that the campus has plenty of classrooms but that those classrooms are located in an undesirable building, one that perhaps lacks integrated technology or is a long walk across campus. With the facts in hand, the academic department and the facilities organization might decide to seek funding for renovations and provide a dedicated shuttle route—solutions that cost far less than a new building, can be implemented quickly, make smart use of the institution's resources, and improve the experience for the faculty and students. Space-utilization systems may seem many steps removed from customer service, but it's all part of the offstage process that creates a positive experience for customers.

### Needed steps:

1. **Contribute to the institutional planning process, including development of the mission, strategy, and master plan.** Senior facilities leaders need a voice in

the creation of the institution's mission, since facilities will be essential to fulfilling that mission and will rely on that mission to give staff direction and purpose.

2. **Create data systems for asset management, space utilization, energy, and maintenance.** Integrated data systems will give facilities managers the data they need to act as good stewards of the college or university's resources.
3. **Promote a culture that incorporates the concept of total cost of ownership by establishing metrics and implementing or updating facilities standards.** The benefits of total cost of ownership can be demonstrated to institutional leaders—as long as the right data is being tracked. Cost savings can be calculated from energy data, parts orders, and maintenance schedules. Be sure you can demonstrate what total cost of ownership can achieve.
4. **Include operations and maintenance staff in the design process, and develop a process to turn over projects from one unit to another.** On small campuses, it might be easier to get the input of maintenance staff on new project designs. In institutions with large facilities organizations, however, the first time operations and maintenance staff might see a new building is the day it opens. Yet, these are the staff who must keep buildings operating for decades into the future. Senior facilities officers need to integrate operations and maintenance review of plans and develop a process to ensure critical information is exchanged when the commissioning team hands over the building to operations.

### Questions for Reflection:

How many people outside the facilities organization are familiar with the concept of total cost of ownership? How can you promote the concept within the institution?

Are the key O&M staff part of the decision-making team during the design process? If not, why not?

### Data Point:

#### Design and construction standards

#### How standards are like a roll of cookie dough

If you buy a roll of cookie dough with its premeasured and premixed ingredients, slice it and bake it at the indicated temperature, you'll get the cookies you expect to get, every time. Established, campuswide standards for materials, equipment, and construction are like slice-and-bake cookies. They contribute to efficiency, time, and cost savings; provide standardized components; streamline communication between college officials and outside vendors such as planners, designers, architects, suppliers, and construction personnel; and contribute to everything from budget savings to campus aesthetics.

— Shannon O'Connor, *By the Book: Campuswide Design and Construction Standards*, College Planning and Management, July 1, 2006.

### Energy and utilities: Balancing needs and sustainability

#### The goals:

#### 1. Create an efficient, cost-effective energy system that meets campus sustainability goals.

Maintaining the campus energy grid and performing superior customer service may seem unrelated—but there is probably no more fundamental customer service you can provide than “keeping the lights on.” This seems an easy job for customers who have to do nothing more than flip a switch, but facilities professionals recognize the complications of energy management for enormous, power-hungry campuses. Many colleges and universities rely on decades-old electrical systems that are pushed to the limit by the demands of the 21st century. But remember that we don't build buildings to save energy. The finished product must also meet customer expectations for comfort. Meeting these demands requires tough decisions when institutions also need to keep costs low and meet campus sustainability goals.

## 2. Achieve a balance between reliability and resiliency.

No electrical grid is 100 percent reliable or 100 percent resilient—that is, hardened against failure. It's simply not possible to pour enough money into either goal, and unexpected calamities from natural disasters to human error can still interrupt power. Institutions must prioritize those portions of the campus where power is most essential (hospitals, research labs, and residence halls usually top the list).

Align the energy system with the mission, goals, and master plan of the institution. The goals of the institution should be supported by the energy system. An institution seeking to be a leader in advanced research requires a robust electrical grid that will withstand threats to program interruption. A college or university that prioritizes environmental stewardship can support its goals with an energy program that reduces carbon consumption, relies on renewable sources, and promotes conservation. Institutions seeking to improve their financial stability can structure their energy system to reduce the impact of energy cost fluctuations while lowering operating costs. Aligning the utility plan with the plans of the institution yields long-term results for the entire campus.

## 3. Support a sustainable business model for the institution.

Energy costs are currently low, but global demand is expected to rise steadily over the next few decades. Meanwhile, the remaining supply of fossil fuels will become more difficult and more expensive to acquire as easy reserves are tapped out. It's a recipe for increasing uncertainty and rising prices. Institutions must take charge of their energy future and reduce the risks posed by sudden jumps in fuel costs. Diversifying fuel sources is a wise first step.

### Needed steps:

1. **Create a rigorous system to capture and analyze energy data.** Colleges and universities once had little idea where energy was being used on campus, but today's systems can track the flow of electricity to individual offices and dorm rooms. Smart institutions are capturing this data and employing a variety of tools to search for trends and identify problem points.
2. **Diversify energy sources.** Institutions should seek to widen the base of sources for their electrical grid both to increase the use of renewable energies and to reduce the risk of overreliance on one source.
3. **Establish service standards.** Energy service standards offer the same advantages of design or maintenance standards: They establish a framework for maintenance and create efficiencies. Institutions should standardize their electrical service as much as possible.
4. **Create a utility master plan that addresses potential future scenarios.** Few markets are as global as energy—or as unpredictable. Nevertheless, institutions can posit a range of future scenarios and craft a utility master plan that addresses multiple possibilities. The result will be a far more useful plan than one that assumes a single rosy outlook.
5. **Create a customer communications system to keep stakeholders informed under a variety of conditions.** Customers are most frustrated when they're left in the dark—both literally and figuratively because of lack of information. Facilities organizations should work with IT experts on campus to design a communications system that will keep customers informed if the lights go out. Such a system must be easy for staff to use in a crisis and should communicate across as many forms of media as possible.

### Questions for Reflection:

Does your energy plan reflect the mission and goals of your institution?

Do you have a sustainability plan with metrics and measurable goals?

**Data Point:****The Customer Experience***Extending service at every opportunity*

While in a small resort town in Idaho, we ran over a board on the highway and got a flat tire. We drove to Les Schwab Tires, even though the tires on the car were not from Les Schwab. The company fixed the tire for free because it had us as a past customer in the database.

The lesson I took away from this is that Les Schwab values its customers and will make sure that we stay customers by treating us well even when we are using a competitor's product. Relationships and good customer service matters.

– Stacy M. Pearson, Vice President of Finance and Administration, Boise State University, Boise, Idaho

**Operations and maintenance: Creating a first-class offstage operation****The goal:**

Fulfill all operations and maintenance tasks to the standards outlined in APPA's operational guidelines.

APPA has identified operational standards for maintenance, grounds, and custodial services, clearing defining what constitutes exemplary levels of service for higher education facilities. For example, the *APPA Operational Guidelines for Education Facilities: Custodial* employs a common language to define the cleanliness of buildings, ranging from “Level 1 – Orderly Spotlessness” through “Level 3 – Casual Inattention” to “Level 5 – Unkempt Neglect.” These levels are then defined in detail; at Level 1, “Floors and base moldings shine and/or are bright and clean, colors are fresh. No dirt buildup in corners or along walls.” Levels for different types of spaces are proposed (public spaces should be maintained at higher levels than storage or utility spaces, for example), and methods are given for calculating the time required to clean to each level.

Facilities organizations that adopt these standards are doing their part to improve what Cockerell called off-

stage operations. While facilities staff may not regularly engage with external customers—students, parents, etc.—they create the stage on which these interactions take place. In the language of a theater, they maintain the set, manage the sound and lights, and ensure the seats are comfortable and the floors clean. Failure in the offstage staff leads directly to failure of the entire performance.

Goals in support of the primary aim to meet operational standards include the following:

1. **Collect and utilize key performance metrics.** APPA's operational standards give facilities professionals clearly defined measures that can be tracked over time to understand failures and improve performance.
2. **Make workload primarily preventive/predictive rather than reactive.** Facilities shouldn't always be managing the latest crisis. The bulk of the workload should consist of ongoing maintenance—that is, maintenance that prevents crises from ever occurring. APPA's guidelines lay out maintenance schedules that should keep system failures to a minimum.
3. **Rely on mobile communications and data management technology to streamline operations, track work orders, and gather data.** If Domino's can tell its customers the moment their pizzas leave the oven, facilities organizations should be able to tell their staff what jobs need doing and alert customers that help is on the way. Technology has advanced rapidly, and new systems allow organizations to communicate with staff on the go, manage assets, and schedule preventive maintenance. Materials or supply management systems speed purchasing and enable next-day delivery of supplies while optimizing inventory levels, whereas automation systems monitor building systems and notify the facilities organization of problems before customers even notice something has gone wrong.

**Needed steps:**

1. **Create a business case for change.** Senior facilities professionals can quantify many of the improvements gained by implementing APPA's standards. The cost

of preventive maintenance, for example, can be compared with the cost of cleaning up after a crisis.

2. **Train staff at all levels.** Staff need technical training to master unfamiliar technology, fulfill additional requirements, and achieve higher goals. They also need training that helps them understand the meaning behind their work and the connection between maintaining high standards and the goals of the college or university. For example, overgrown flower beds and dirty bathrooms create a negative impression in the minds of key customers—from potential students to members of the community.
3. **Establish metrics, gather and analyze data, and realign resources as needed.** Implementing standards won't be a one-time activity; it will be an ongoing effort in which key metrics are assessed regularly in a bid for continuous improvement. One important measure would be to periodically assess your *internal* customer service; that is, the work environment of the staff.
4. **Empower staff and encourage innovation.** It's not easy to let go of control and trust your staff, but remember that the companies with the highest reputations for customer service are those that give their employees enormous leeway in doing their jobs. Build your culture, train your staff, set high expectations, and then let your employees meet those expectations. Make sure to reward those who go above and beyond, and remember that the real test comes when someone goes too far. Empowerment means backing employees even when things go wrong. When someone makes a mistake, do you help them clean it up—or do you throw them to the wolves?

### Questions for Reflection:

How much of your work is preventive and how much is reactive?

How do you increase the proportion of predictive maintenance?

### Data Point:

#### The Customer Experience *Serving through catastrophe*

Hurricane Katrina hit the University of Southern Mississippi in 2005 and left the campus at a standstill. No power. No water.

The campus staff stepped up to the challenge—Aramark [the food service contractor], physical plant staff, residential life staff. Aramark cooked three squares a day for 10 days. They trucked ice, food, and hygiene products for students. Physical plant and residential life employees worked even though their families needed them. They got the campus up and running again in record time!

The lessons learned were the importance of teamwork—and that the need to take care of your students sometimes prevails over yourself.

— Sid Gonsoulin, Associate Vice President for Student Affairs, Southern Mississippi University, Hattiesburg, Mississippi

### General administration and management: Getting a seat at the table

#### The goals:

1. Be a strategic partner of the institution and a critical team member at the decision-making table to achieve the institution's goals.

This goal ties directly back to Robert Spector's call for customer-centric organizations to help their employees feel part of something bigger than themselves. At every level, facilities staff need to understand the goals of their college or university and work diligently toward the fulfillment of those goals.

This process would be easier and more straightforward if facilities were involved in setting institutional goals in the first place. Facilities leaders involved in institution-wide planning and decision making can contribute

to the process with critical information about the infrastructure and built environment. Senior facilities leaders can help institutions avoid costly mistakes and make wise investments. At the same time, facilities will have a greater sense of ownership and commitment to the institution's plans.

## 2. Implement systems, technologies, and practices that provide a framework for enhancing the customer's experience.

Once the mission of the facilities organization is identified and goals are set, senior facilities officers must consider which administrative and management functions need to be remade to support those goals and enhance the customer experience. For example, clear and prompt communication with customers is an essential element of excellent customer service, but a facilities organization will be unable to provide that level of communication if it lacks the proper work-management systems and customer feedback tools.

### Needed steps:

1. **Define what's getting in the way of facilities taking a high-profile role within the institution.** A number of factors could be limiting the role of senior facilities leaders. Is it simply a question of expressing a desire to participate to key decision makers? Or do senior institutional players need to be convinced of the value facilities can bring?
2. **Identify key stakeholders with the power to help advance facilities.** Facilities staff need champions. They need to know who backs their involvement and who stands in the way.
3. **Take the initiative in developing relationships with stakeholders and introducing them to the potential of partnering with facilities.** Don't wait until you're invited to the table. As one participant in the symposium said, "Set your own table." Create forums for discussion of critical institutional issues and involve the right people.
4. **Develop partnerships with key stakeholders on projects going forward.** Don't just tell others within the institution that you can help them, show them your strengths. Remember the importance of internal customer service, and treat each of these stakeholders as a million-dollar customer. Be their hero.
5. **Identify the Moments of Truth** (*see sidebar next page*) **where your organization interacts with customers, and target those places where failures can occur.** The facilities organization interacts with its customers in dozens of ways—and you can either satisfy or frustrate your customers at each of these points. Draw up a map of how and why customers interact with you, and then assess what can go wrong along the way. The points where interactions go wrong should be your focus.
6. **Assess what needs to change to improve the customer experience.** How do you smooth out the rough places on your customer interaction map? Do you need better technology—that is, communications and work-management systems that streamline how you address problems? For example, when someone on campus calls in a problem, does your system automatically know where they're calling from? Do you have the data analysis systems that help you plan maintenance and predict service needs? If the right technology is in place, do problems arise out of gaps in training? Do staff know how to interact with customers to provide an exceptional experience?

### Questions for Reflection:

Which point of interaction between the facilities organization and your customers routinely creates tension and bad feelings? What would it take to resolve that problem point?

**Data Point:****Improving administration and management functions***Identifying Cycles of Service and Moments of Truth*

To improve the customer experience, experts Martinez, Smith, and Humphreys, in their book *Creating a Service Culture in Higher Education Administration*, recommend two well-established customer service concepts, Cycles of Service and Moments of Truth.

A Cycle of Service breaks down customer interactions into a series of steps. At every step, the customer experience can either be enhanced or diminished. Here is an example of the Cycle of Service that occurs when a potential student visits campus: If the student can't figure out where to park, the student's opinion of the institution will fall; if the tour guide is knowledgeable and engaging, the student's opinion will rise.

The points along the Cycle of Service are called Moments of Truth. The quality of those Moments shapes the customer's impression of the entire organization. "A critical Moment of Truth may determine whether a customer maintains a relationship with your institution or tells 10 other people what a bad experience he or she had on your campus. Well-executed Moments of Truth . . . produce customer satisfaction and, perhaps more important for the long term, loyalty."

Facilities organizations can map their own customer interactions by walking through every step of a typical customer interaction—for example, a faculty member calling to report the heat is out in the office. What happens at every step along the way? How long does the process take? What can go wrong at each point of contact? What should go right? Facilities leaders can use this assessment to identify problems and develop targeted solutions.

**Benefits to the facilities organization and the institution**

A transformed facilities organization will reap the rewards of its transformation efforts in myriad ways. By creating a committed culture that prioritizes exceptional customer experiences, facilities will become stronger, more capable organizations better able to support the mission of the institution.

Specific benefits include the following:

**Improved use of institutional resources.** The facilities department can stretch the institution's dollars by fine-tuning processes, implementing advanced management and operational technology, and working from standards. For example, preventive maintenance is perhaps the least visible but the most cost-effective element of the APPA standards. Buildings and building systems that are maintained on a schedule cost less to operate because they rarely get a chance to fail; at the same time, staff are better utilized because they're not constantly combating the next crisis.

**Improved customer experience.** Customers should have an exceptional customer experience every time they call to report a water leak or walk into a new classroom. When operations are optimized, customers may not even consciously notice that the temperature of rooms is comfortable, the lawns are impeccable, the public spaces invite interaction, and the energy grid hums along efficiently. But the stage will be set for a great performance by the other players at the institution.

**Improved sustainability of the campus.** Many campuses have incorporated sustainability into their mission, while others have made strong commitments to environmentally-conscious operations. The facilities department can make some of the greatest contributions to sustainability by reducing energy use, limiting waste, and educating consumers about their choices.

**Fewer disruptions from emergencies.** A facilities emergency ruins everyone's day—from the students and faculty unable to continue class to the administrators



struggling to explain the problem to visiting donors. A focus on preventive maintenance is a powerful solution to multiple problems.

**Reduced risk.** Many senior administrators have no idea of the risks posed by energy failures; however, the threat to the health and safety of the college or university community—as well as to the bottom line—is enormous. Institutions manage risk all the time. It’s time to include maintenance operations and energy among those risks.

**Improved morale among facilities staff.** Work that feels purposeless is the least satisfying. Work that is connected to a greater purpose is meaningful and re-

warding. By taking steps such as increasing predictive maintenance and streamlining processes, you will give your employees more opportunity to focus on the big picture. What’s more, building a culture of commitment will help staff understand their role in the institution as a whole.

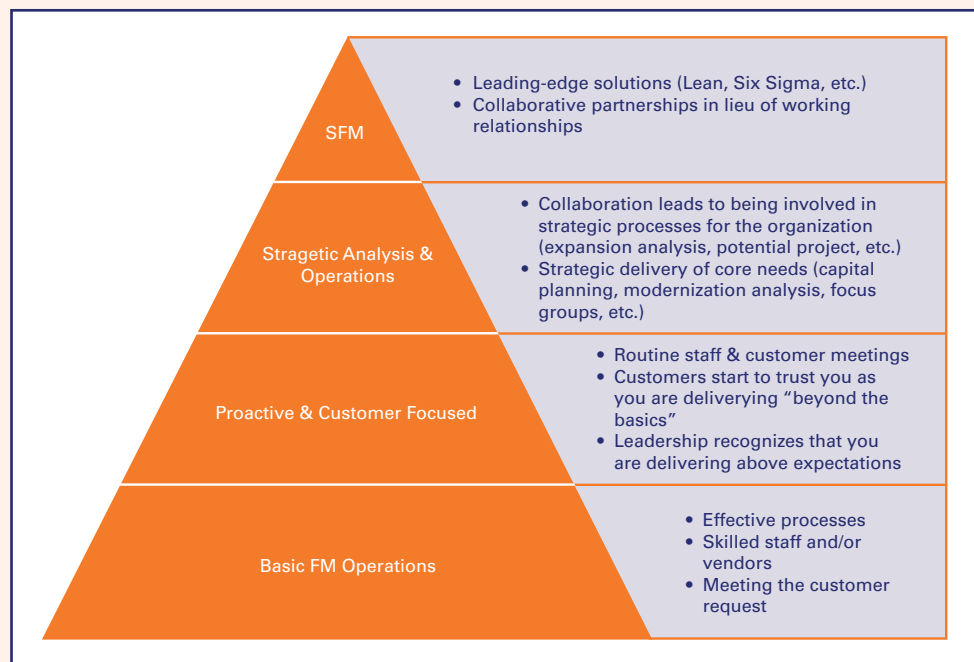
**Better reputation as an employer within the community.** Higher education should be an employer of choice within the community—but that reputation must be earned. Word will get out if the organization treats its employees fairly, empowers them to do their jobs, and creates a culture of commitment.

## Data Point:

### From effective operations to strategic management

#### Building a foundation of facilities management success

If the ultimate goal of higher education facilities leaders is to play a strategic decision-making role at the university, they should start with the basics, urged Ellis Kirby and Kathy Roper in the article “A Path to Strategic Facilities Management.” They propose a process whereby facilities leaders motivate their organization to optimal performance by moving from effective basic operations through proactive and customer-focused service to strategic analysis and operations and, ultimately, strategic facilities management.



– Ellis Kirby and Kathy Roper, “A Path to Strategic Facilities Management,”  
(from *Effective and Innovative Practices for the Strategic Facilities Manager*, APPA 2014)

## Section 6:

### Conclusion

Creating exceptional experiences for the customers of higher education facilities organizations will require hard work, but one part of the job, at least, will be easier for higher education than many other industries. Colleges and universities have always had a strong sense of mission and purpose.

This is a unique advantage that higher education should employ to its benefit and purpose. Colleges and universities were founded to further learning, expand knowledge, push the boundaries of research, and preserve our cultural heritage. This mission can get lost in the day-to-day workings of institutions, but in fact the foundational principles of higher education are deeply meaningful.

Few other organizations can claim such an inspirational purpose and overall mission. We encourage institutions to **claim their mission and use it to motivate their organization**. Employees who feel part of something bigger than themselves are the most committed to the

institution and will bring their best efforts to all they do. An organization working together toward higher goals cannot help but create exceptional experiences every day.

Remember this time-honored story:

A man came upon a construction site where three people were working. He asked the first, “What are you doing?” and the man replied: “I am laying bricks.” He asked the second, “What are you doing?” and the man replied: “I am building a wall.” As he approached the third, he heard him humming a tune as he swept the dust from the floor. The visitor asked, “What are you doing?” The man stood, looked up at the sky, and smiled, “I am building a cathedral!”

Every employee of the facilities organization can feel like that cathedral worker, motivated by the greater purpose of the institution. It’s up to senior facilities leaders to inspire their staff and create a culture where the exceptional is possible, and even expected.

## Appendix A: *The Context of Higher Education in 2016*

The costs to operate a college or university campus have risen at a record pace, while government funding remains stagnant. Tuition prices have increased along with student debt levels, creating widespread backlash. Students, parents, and elected officials are demanding accountability. Institutional leadership must confront these issues head-on to find a long-term path for colleges and universities.

The challenges on campus include the following:

**A financially strained higher education environment.** State funding for colleges and universities has begun to increase since the low of 2012, according to the annual Grapevine report prepared by the Center for the Study of Education Policy at Illinois State University and the State Higher Education Executive Officers. Funding grew by 4.1 percent overall, with 39 states reporting increases and nine reporting decreases. (Two states, Illinois and Pennsylvania, had not finalized state budgets as of this writing.) Increases vary widely between states: Kentucky raised funding by only 0.1 percent, while Oregon authorized a hefty 16.2 percent. Nevertheless, funding in many states has yet to return to pre-2010 levels; in 2015, half of states spent less on higher education than they did five years previously.

Tuition continues to rise faster than inflation, according to the College Board, with published tuition and fees increasing about 3 percent between 2015 and 2016 despite a zero percent inflation rate during the same period. Financial aid has not kept pace with the increases, the College Board says, meaning the net price for families grew even more. Student loan debt has reached \$1.3 trillion, with the average 2016 graduate owing \$37,172. Nevertheless, the pressure to provide a high-quality education for precious tuition dollars keeps growing.

**Inefficient systems and operations.** The financial pressures on institutions have focused attention on internal operations. Critics continue to call attention to the high percentage of institutional budgets that go to administration, operations, and facilities rather than to teaching and research. Many believe colleges and universities can improve their affordability by increasing the efficiency of operations, cutting bureaucracy, and reducing regulatory requirements.

For example, the Ohio Taskforce on Affordability and Efficiency published a report in 2015 on ways Ohio state institutions could “find efficiencies, locate new resources and otherwise innovate to lower costs and reduce the financial burden on students.” The task force found a number of opportunities for improvement, including improving space utilization, conducting asset reviews, and creating collaborative purchasing contracts. Improvements are possible, but it will take work to realize them.

**Rapidly changing student needs and expectations.** A major challenge for colleges and universities is that long-held assumptions about students are falling away as demographics shift, technology evolves, and expectations change. The typical student was once young (between 18 and 22), white, middle-class, and male. Today, the student body is increasingly older, racially diverse, and female. Students are attending college later in life, and many more are women—females make up about 57 percent of all college students, according to the National Center for Education Statistics. Minority populations are a growing presence on campus, with the University of California system announcing in 2014 that it admitted more Latino students (29 percent) than white (27 percent) that academic year.

Today’s students are more likely to be working to put themselves through school. They are likely to be the first

**Data Point:****Changing demographics***Meet the Millennial customer*

The Millennial population, born between 1980 and 1998 (roughly) is now the largest in the United States, with 75.4 million members, passing the Baby Boomers (74.9 million). According to customer service expert Micah Solomon, the Millennial generation is characterized by the following traits:

1. **Millennials accept technology as a given—and as part of their identity.** They “expect technology to always work, and work easily” and use mobile devices for everything from shopping to donating to charity to watching TV.
2. **They’re a social generation.** Millennials travel in packs—they shop, dine, and travel in groups. And when they’re not physically together, they are connected virtually.
3. **They collaborate and cooperate.** Millennials were raised with a “we can fix it together” mentality. They bring a collaborative attitude to education, work, and even the products and services they use.
4. **They’re looking for adventure (and whatever comes their way).** Millennials crave experiences and discoveries. They seek out the exotic, adventuresome, and memorable and are willing to take risks to get what they want.
5. **They’re passionate about values.** Baby Boomers taught their kids that they can make a difference in the world. More than 50 percent of Millennials make an effort to buy products from companies that support the causes they care about, and they are willing to pay a premium for products they believe in.

– Excerpted from Micah Solomon, *Your Customer Is the Star: How to Make Millennials, Boomers and Everyone Else Love Your Business*, Forbes Media, 2014.

or second generation of their family to attend college or university. Further, they are digital natives for whom technology is commonplace. Meeting the needs of this generation while addressing all the other pressures on higher education will be a major challenge.

**A changing work environment.** Both the campus itself and the workers in charge of it are aging. Nearly 70 percent of buildings on college and university campuses are more than 25 years old; 37 percent of buildings are more than 50 years old. These buildings need significant care and attention just to get through the day and major capital investment if they are to reach the middle of the century. Newer buildings—those constructed in the last 10 to 15 years—contain complicated systems and require ongoing attention from expert staff.

Meanwhile, shifting pedagogies and technological innovations have a ripple effect on classrooms, labs, and offices. Demand is growing to make learning spaces more flexible, workspaces more connected, and social spaces more engaging. Facilities organizations also confront questions about the future of energy costs and growing demands to improve sustainability.

At the same time, the facilities workforce is aging. The average age of a facilities employee is 45. Every year, highly experienced staff retire and take their institutional knowledge with them. It’s harder every year to replace them as demand for skilled tradespeople soars.

## Appendix B:

### Expert Sources

APPA would like to thank the expert sources who contributed to this year's report.

**Michael Bills** is director of human resources at JW Marriott Desert Springs Resort & Spa in Palm Desert, California. Bills has been with Marriott International for 25 years, with 15 years in human resources. Before transferring to the JW Marriott Desert Springs Resort & Spa in 2013, Bills worked at the San Francisco Marriott Marquis, San Francisco Courtyard by Marriott, and the San Francisco Airport Marriott Waterfront hotel. Prior to joining Marriott International, he served in the U.S. Navy and received the Navy Achievement Award for his service during Operation Desert Storm.

**William Blodgett** is director of hotel operations at JW Marriott Starr Pass Resort & Spa in Tucson, Arizona. Blodgett began his hospitality career in 1977 working as a banquet houseman at the Five Star, Five Diamond Camelback Inn in Scottsdale, Arizona. Blodgett has an extensive background in leading award-winning teams in both group and local catering. In 2004, he was chosen to be part of the opening leadership team, as director of event management, for the 575-room JW Marriott Starr Pass Resort. He also worked as director of food and beverage before being promoted to his current position. In 2008, Blodgett was awarded the Global Event Management Leader of the Year for Marriott Hotels & Resorts. He successfully completed the Aspen Wye River Leadership Training course in 2012.

**Lee Cockerell** is the former executive vice president of operations for the Walt Disney World® Resort. As the senior operating executive for 10 years, Cockerell led a team of 40,000 Cast Members and was responsible for the operations of 20 resort hotels, four theme parks, two water parks, a shopping and entertainment village, and the ESPN sports and recreation complex in addition to the ancillary operations supporting the number one vaca-

tion destination in the world. Cockerell has held various executive positions in the hospitality and entertainment business and was with Hilton Hotels for eight years and the Marriott Corporation for 17 years before joining Disney in 1990 to open the Disneyland Paris project. He now dedicates his time to public speaking and writing. Cockerell's books include *Creating Magic: 10 Common Sense Leadership Strategies from a Life at Disney*; *The Customer Rules: The 39 Essential Rules for Delivering Sensational Service*; and *Time Management Magic: How to Get More Done Every Day and Move from Surviving to Thriving*. Cockerell's *Lessons in Leadership* blog and podcast are available at <http://blog.leecockerell.com/>.

**Micah Solomon** is a best-selling author, consultant, keynote speaker, and thought leader on customer service, the customer experience, corporate culture, and hospitality. Solomon specializes in building stellar, profitable customer experiences, company culture, 21st-century marketing, and social (and anti-social!) media. Solomon was recently named a "new guru of customer service excellence" by the *Financial Post*. His books *Your Customer Is the Star: How to Make Millennials, Boomers and Everyone Else Love Your Business*; *High-Tech, High-Touch Customer Service*; and his perennial best-seller, *Exceptional Service, Exceptional Profit*, have won multiple awards and have been translated in more than half a dozen languages. Solomon is a regular contributor to *Forbes.com*, and his expertise has been featured in *Inc. Magazine*, *Bloomberg Businessweek*, *CNBC*, and the *Harvard Business Review*. Free chapters of Solomon's books are available at [www.micahsolomon.com](http://www.micahsolomon.com); his articles at *Forbes.com* are found at [www.forbes.com/sites/micahsolomon/](http://www.forbes.com/sites/micahsolomon/).

**Robert Spector** is a best-selling author, international speaker, and customer service expert. Based in Seattle, he has helped companies create their customer service experiences for more than 30 years. Spector is recog-

nized worldwide as the ultimate authority on customer service and the *Nordstrom Way*. He is the author of the business classic *The Nordstrom Way: The Inside Story of America's #1 Customer Service Company*. Spector believes that the elements of world-class customer service are the same, whether they come from Spector's Meat Market (his family's mom-and-pop store), Nordstrom, or Amazon.com, the subject of his international best-seller *Amazon.com: Get Big Fast*. He has contributed articles to publications nationwide, including the *New York Times*,

*Wall Street Journal*, *Sports Illustrated*, and *National Lampoon*. He has been a guest expert on countless national and local television, radio, and Internet programs and is quoted in publications throughout the world. A graduate of Franklin & Marshall College, Spector teaches retail leadership at the University of Washington School of Business, drawing from the work he's done on Seattle-based giants, including Nordstrom, Amazon.com, Starbucks, and Costco. Learn more about Robert Spector at his website [www.robertspector.com/](http://www.robertspector.com/).

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## Appendix D:

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