

The Facilities Guide to Building a Better Case with Your Board

Introduction

At today's colleges and universities, the physical campus is perhaps their most valuable asset, so your board members should have a keen interest in the stewardship of this asset. But if you're like many campus facilities leaders, you may find it difficult to have a productive conversation about facilities with the board of trustees.

Have you ever wondered:

- Why is your board not focused on facilities stewardship?
- What can you do to inspire your board to improve facilities' conditions?
- How can you make the conversation around facilities needs more productive?

If you are having difficulty leading productive meetings with your board on facilities issues, it's time to reshape the conversation about facilities management. Over the following pages, we'll present strategies for shifting discussions from technical facilities needs to institutional solutions and building a relationship with one of your most powerful potential allies within the community.



The Steps to Building a Better Case

To make any improvement or investment in campus buildings, facilities leadership will need support from the institution's board of trustees. This group of individuals has a fiduciary responsibility to support the president and approve major policies, make long range plans, and oversee the budget, so their support is necessary for any capital project.¹ Yet the balancing act trustees must manage has become more challenging. As boards are confronted with ever more compelling needs for resources, it becomes more difficult to master the intricacies of every department.

For facilities management, this means the board of trustees is looking for big picture information on how funding a specific improvement will meet broad campus goals and keep institutional success in mind. What they often receive, however, is a list of technical problems that need repair. This leads to a disconnect in the conversation that facilities leadership is prepared to have and the information that board members are actually seeking. If facilities management truly wants their boards' support, they must stop approaching facilities problems solely as a technical issue and start speaking directly to the issues in the forefront of trustees' focus through conversations around strategy and solutions.

If you're committed to making this shift from technical issues to strategic savvy, consider the following tools to make conversations with your board members more productive.

1. Gather the Right Data

The first step in driving facilities management strategy must be getting the right information in place. You've likely heard before the importance of documenting everything. This raw data is a critical ingredient for telling a story, and a crucial starting place for building the right argument to take to your board.

The data you collect will depend on knowing your campus improvement goals. It will vary depending on what problem you're addressing but may include condition assessments, energy spending, trends on work orders being issued or benchmarking information. Facilities management needs to be disciplined in documenting everything related to the topic at hand in order to move to the next step for addressing needs. After all, this data is a tool that gives the board enough knowledge to act.

2. Use data to tell a story and create context

Raw numbers are important, but this data has to lead the board in a certain direction. Board members have to look at trade-offs between investing in facilities against other costs, such as faculty salaries and financial aid. So facilities leadership needs to provide context to the data and frame it strategically around broader campus goals.

¹ <http://www.tc.columbia.edu/articles/2009/march/what-do-trustees-do/>

Don't rely on a single data point; it takes multiple data points to tell a story. A single data point in isolation may simply be about loss or gain, growth or decline or stasis. But in conjunction with other data points, a more complete and effective case for what is needed emerges.

For example, the data might show that infrastructure investment is up relative to peers, and this might be perceived as bad in isolation. But if energy costs were up and now they are dropping relative to peers, then you may have the makings of an investment strategy that will yield longer term returns.

This can also be a very powerful tool if the data is not affirming. If a decline in investment correlates to an increase in expenditure, it can demonstrate the purported savings aren't actually there, making it time to put a new strategy in place. Either way, bringing solutions to the discussion for the board to consider is critical to getting them involved.

3. Speak their language

Yes, board members should have a keen interest in the stewardship of valuable facilities assets, but they're also spread among meeting the needs of many other departments. If you're not thinking strategically, your pleas are likely to fall on deaf ears.

Moving beyond the technical jargon is a good first step toward improving communication with trustees. By going further and using language that speaks directly to your audiences' concerns, you can gain the attention you need to make your case. The use of shared terminology helps frame your supporting data with a narrative that speaks directly to trustee's goals.

Consider asking questions that speak to your audience's concerns, such as:

- How does this facility need impact educational quality?
- In what ways does the issue effect institutional financial stability or other risk measures?
- Does this work support innovation, in the curriculum, research, student life or overall wellness?
- Is the work connected to presidential leadership and strategic goals?
- Could this work alter the relevance of the institution in the marketplace?
- What bearing might the work have on significant current campus issues, like free speech?

4. Consider who will speak

Understanding who should be delivering the message and when you should engage your board is also important. This isn't always as straightforward as one might think. Does your board put more stock into your insight or are they more likely to act based on a third-party recommendation? When you engage also can be important. Engaging early to secure the right sponsorship is a good practice.

5. Secure advocates first

Hopefully the president is already on board with your cause, but if not, make sure you have an advocate who has your back in board meetings. This is one reason legwork before the meeting is so important. Of course, even the best preparation is likely to be met with oblique questions. It is crucial to have a partner or two to help dig to the root of the questions and work together to get back on track.

6. Focus on solutions, opportunities and the future

When facilities leadership comes to a discussion presenting a list of problems, they're building on the cost-center reputation of the facilities department. Instead, amplify the odds of successfully getting the support you need by focusing on solutions and results. Talk about how addressing specific problems presents opportunities for greater efficiencies, savings and reallocation of resources.

For example, by operating more effectively and efficiently facilities management can reinvest savings into further asset-enhancing projects and preventative work. If these are possible outcomes of your proposed strategies, make sure the trustees see the light at the end of the tunnel.

Don't hesitate to think big. If you can show the view of a brighter future, providing hope that your solutions can help trustees create their legacy, you're speaking to an issue that will catch their attention.

7. Keep the conversation going

If you really want to build a relationship with this potential ally, a request for funding shouldn't be the only time you interact with your board. Engage your board over time by measuring and reporting on performance and impact of policies.

Boards want to know they are getting the best bang from money spent on facilities. For example, if you're using savings from a successful energy reduction project to enhance the campus annual stewardship fund, schedule time with your board to show them the value of these opportunities and how this work can lead to greater savings in the future. Through ongoing interaction, the board will gain a clearer understanding of how policies and strategies for managing facilities are moving the institution closer to its overall goals.



Conclusion

Your board of trustees is dedicated to ensuring that the institution is financially sound and to truly meet this goal they need facilities management as a partner. But a board balancing institutional goals, debt limits, reductions in funding, increases in capital demands and other factors often beyond their control needs support from facilities leadership to move the campus in the right direction.

Facilities leadership has an opportunity to evolve the department's focus beyond maintaining buildings to supporting campus growth or viability. By providing context to problems, focusing on solutions and using rich data to support strategic planning conversations, facilities management will be able to serve as a more valuable partner in supporting trustees in achieving a campus vision that meets everyone's needs.



About Sightlines

Sightlines, a Gordian Company, is a leader in helping colleges and universities better manage their facilities operations and capital investments. Sightlines provides tools for strategic planning, analyzing and benchmarking that generate an independent, reliable comparison of campus performance in these areas against peer institutions.

Using its unique, proprietary Facilities Benchmarking & Analysis process, Sightlines visits each campus annually to collect more than 200 indicators of facilities and financial data and then identifies trends and provides useful analysis and benchmarks. With Sightlines, institutions receive the context and validation they need to make sound, clear, informed and financially credible decisions about campus facilities. As a result, campuses can optimize capital investments, address backlog of deferred maintenance projects, develop a strategy to steward physical assets, improve the effectiveness of facility operations, reduce energy consumption and better serve students, faculty, staff and visitors.

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