



OPERATIONAL ASSESSMENTS AND PLANNING METRICS

Introductions

- Jim Carruthers, Senior Project Manager
 - Conducted Assessment Studies in CSU and other major public universities
 - Managed A. S. and Student Union entities in CSU and UC
- Matthew Bohannon, Project Manager
 - Manager of B&D's Southern California Office
 - 6 years studying and planning auxiliary facilities
 - CSULB, CPSLO, CPP, CSUSM, SDSU, SFSU, UCB, UCR, NMSU, EWU, UWT, GMU, UM, UTEP, UK, UNM, WSUV, UCM, UNCG, Marshall, Rutgers, Indiana, and Ohio University

Presentation Outline

- Goals and Outcomes
- Impediments to Success
- Strategies for Improvements
- California / National Trends
- Operational Metrics
- Case Studies
- Discussion

Goals and Objectives

- Understand the importance of comprehensive planning.
- Recognize best practice planning methodologies.
- Outline evaluation and assessment criteria.
- Identify resources that attendees may use to assist with planning and assessment activities on their own campuses.

Impediments to Success

- Insufficient Will Power to Affect Meaningful Change
- What's left after all the low hanging fruit has been picked?
- Does it seem like we are just tinkering with the edges still, rather than addressing larger problems?
- Better financial performance may require significant changes to current practices and tough choices.
- Without executive support, initiatives will likely fail.
- Talk to colleagues, it can get lonesome when you are leading the effort.
- Too Many Ideas are Off the Table From the Beginning
- What really is essential to our mission?
- Programs, operations, or services sometimes become “untouchable” even though they are extraneous to the auxiliary’s or university’s mission.
- Limiting ideas from the outset constrains the options for success.

Impediments to Success

- Inadequate Planning Process
- How accurate are our data and analyses?
- Are our efforts enough to get the changes we need?
- Executive buy-in without reliable data and analysis is difficult or impossible.
- Trust the data, it is a tool with no agenda.
- Failure to Get the Decision Makers to Decide
- Can you convince them the idea is successful?
- How can they get to a decision point?
- Decision makers need to be involved and understand the aspects and details of any change.

Impediments to Success

- Focusing on Short-Term Fixes vs. Long-Term Solutions
- Are we just treating the symptoms of the problem?
- How can we craft a solution that addresses short-term problems and long-term financial stability?
- Band-aid approaches simply are not sufficient.

Strategies for Improvement

- **Be Proactive**
 - Plan and act rather than wait for the solution to be delivered.
 - Take advantage of opportunities.
 - Tough times can motivate stakeholders.
- **Possess Institutional Will**
 - Decisions to improve the bottom line may not make everyone happy.
 - Effectively manage the trade-offs for stakeholders, if any (performance, services, etc.).
 - Be confident moving forward with well thought out and analyzed ideas.

Strategies for Improvement

- Use Institutional Vision and Business Plans as Foundations
- Solid financial plans must be aligned and developed with mission-centric priorities, rather than across-the-board cuts.
- Know where you can leverage your assets for greatest value.
- Translate those assets into a detailed business plan.
- Have Effective Leadership
- Management needs to act effectively to plan, communicate, execute, and evaluate initiatives.

Strategies for Improvement

- **Be Deliberate But Patient**
 - Keep in mind that short-term improvements may not be on a large scale, but long-term financial stability will happen.
 - Don't underestimate the value making minor changes now will have on your bottom line five or ten years down the road.
- **Allow for Flexibility**
 - We live in a dynamic environment.
 - Plan some flexibility into initiatives to allow for growth and entrepreneurship moving forward.

California / National Trends

- Enrollment Pressure
- Reduced State Funding Limiting Enrollment Growth
- Direct Impact on Auxiliary Funding and Services
- Budget Cuts / Downsizing
- Furloughs
- Higher Expectations on Return to University
- Consolidation / Outsourcing
- Identification of Duplicated Services
- Less Expensive Off-Campus Alternatives
- Operational Assessments
- UC Berkeley Overall University Assessment
- Projected \$75M Savings in Year 1

Operational Metrics

- Metrics
- Comparative Measurements
- Established to Create a Standard Measure to help assess the Organizations Performance
- Inward thinking, external outcomes
- The Key is to Create Metrics That are Consistent With Goals and Priorities of the Organization

Operational Metrics

- Metrics
- Quantifying Results also Demonstrates Value
- Without the Ability To Quantify Value, it Becomes Difficult to Justify Existence
- Not Defensive Behavior, Rather Practical Methodology for Objective Measurement

Operational Metrics – Reality of Fees

| Campus | Up to 6 Units | Above 6 Units | Health Facilities | Health Services | Instruction Related Activities | Services & Facilities Fee | Student Body Association | Student Body Center | TOTAL |
|---------------------|---------------|---------------|-------------------|-----------------|--------------------------------|---------------------------|--------------------------|---------------------|---------|
| 1 Bakersfield | \$2,334 | \$4,026 | \$6 | \$231 | \$66 | \$12 | \$327 | \$423 | \$5,091 |
| 2 Channel Islands | \$2,334 | \$4,026 | \$6 | \$120 | \$200 | \$70 | \$124 | \$320 | \$4,866 |
| 3 Chico | \$2,334 | \$4,026 | \$6 | \$240 | \$248 | \$4 | \$116 | \$696 | \$5,336 |
| 4 Dominguez Hills | \$2,334 | \$4,026 | \$6 | \$150 | \$10 | \$0 | \$135 | \$318 | \$4,645 |
| 5 East Bay | \$2,334 | \$4,026 | \$6 | \$225 | \$138 | \$3 | \$129 | \$165 | \$4,692 |
| 6 Fresno | \$2,334 | \$4,026 | \$6 | \$186 | \$124 | \$46 | \$69 | \$216 | \$4,673 |
| 7 Fullerton | \$2,334 | \$4,026 | \$6 | \$90 | \$52 | \$72 | \$148 | \$268 | \$4,662 |
| 8 Humboldt | \$2,334 | \$4,026 | \$6 | \$294 | \$544 | \$10 | \$101 | \$185 | \$5,166 |
| 9 Long Beach | \$2,334 | \$4,026 | \$6 | \$90 | \$50 | \$10 | \$88 | \$100 | \$4,370 |
| 10 Los Angeles | \$2,334 | \$4,026 | \$6 | \$165 | \$114 | \$0 | \$54 | \$275 | \$4,640 |
| 11 Maritime Academy | \$2,334 | \$4,026 | \$14 | \$680 | \$130 | \$30 | \$210 | \$0 | \$5,090 |
| 12 Monterey Bay | \$2,334 | \$4,026 | \$0 | \$0 | \$60 | \$291 | \$96 | \$44 | \$4,517 |
| 13 Northridge | \$2,334 | \$4,026 | \$6 | \$108 | \$30 | \$145 | \$156 | \$330 | \$4,801 |
| 14 Pomona | \$2,334 | \$4,026 | \$6 | \$135 | \$40 | \$0 | \$95 | \$240 | \$4,542 |
| 15 Sacramento | \$2,334 | \$4,026 | \$6 | \$146 | \$199 | \$15 | \$119 | \$390 | \$4,901 |
| 16 San Bernardino | \$2,334 | \$4,026 | \$39 | \$167 | \$140 | \$15 | \$81 | \$372 | \$4,840 |
| 17 San Diego | \$2,334 | \$4,026 | \$50 | \$170 | \$350 | \$40 | \$70 | \$241 | \$4,947 |
| 18 San Francisco | \$2,334 | \$4,026 | \$6 | \$222 | \$234 | \$4 | \$84 | \$164 | \$4,740 |
| 19 San José | \$2,334 | \$4,026 | \$66 | \$155 | \$198 | \$30 | \$147 | \$432 | \$5,054 |
| 20 San Luis Obispo | \$2,334 | \$4,026 | \$8 | \$263 | \$262 | \$984 | \$268 | \$387 | \$6,198 |
| 21 San Marcos | \$2,334 | \$4,026 | \$50 | \$130 | \$80 | \$112 | \$100 | \$130 | \$4,628 |
| 22 Sonoma | \$2,334 | \$4,026 | \$28 | \$240 | \$406 | \$26 | \$180 | \$384 | \$5,290 |
| 23 Stanislaus | \$2,334 | \$4,026 | \$8 | \$209 | \$177 | \$187 | \$105 | \$128 | \$4,840 |
| Average | \$2,334 | \$4,026 | \$15 | \$192 | \$167 | \$92 | \$131 | \$270 | \$4,893 |
| Maximum | \$2,334 | \$4,026 | \$66 | \$680 | \$544 | \$984 | \$327 | \$696 | \$6,198 |
| Minimum | \$2,334 | \$4,026 | \$0 | \$0 | \$10 | \$0 | \$54 | \$0 | \$4,370 |
| Median | \$2,334 | \$4,026 | \$6 | \$167 | \$138 | \$26 | \$116 | \$268 | \$4,840 |

| Campus | Student Body Associatn | Student Body Center | TOTAL | Campus Enrollment |
|---------------------|------------------------|---------------------|-------|-------------------|
| 1 Chico | \$116 | \$696 | \$812 | 16,934 |
| 2 Bakersfield | \$327 | \$423 | \$750 | 8,003 |
| 3 San Luis Obispo | \$268 | \$387 | \$655 | 19,325 |
| 4 San José | \$147 | \$432 | \$579 | 31,280 |
| 5 Sonoma | \$180 | \$384 | \$564 | 8,546 |
| 6 Sacramento | \$119 | \$390 | \$509 | 29,241 |
| 7 Northridge | \$156 | \$330 | \$486 | 35,198 |
| 8 Dominguez Hills | \$135 | \$318 | \$453 | 14,477 |
| 9 San Bernardino | \$81 | \$372 | \$453 | 17,852 |
| 10 Channel Islands | \$124 | \$320 | \$444 | 3,862 |
| 11 Fullerton | \$148 | \$268 | \$416 | 36,262 |
| 12 Pomona | \$95 | \$240 | \$335 | 22,273 |
| 13 Los Angeles | \$54 | \$275 | \$329 | 20,619 |
| 14 San Diego | \$70 | \$241 | \$311 | 33,790 |
| 15 East Bay | \$129 | \$165 | \$294 | 14,749 |
| 16 Humboldt | \$101 | \$185 | \$286 | 7,954 |
| 17 Fresno | \$69 | \$216 | \$285 | 21,500 |
| 18 San Francisco | \$84 | \$164 | \$248 | 30,469 |
| 19 Stanislaus | \$105 | \$128 | \$233 | 8,586 |
| 20 San Marcos | \$100 | \$130 | \$230 | 9,767 |
| 21 Maritime Academy | \$210 | \$0 | \$210 | 823 |
| 22 Long Beach | \$88 | \$100 | \$188 | 35,557 |
| 23 Monterey Bay | \$96 | \$44 | \$140 | 4,688 |
| Average | \$131 | \$270 | \$400 | 18,772 |
| Maximum | \$327 | \$696 | \$812 | 36,262 |
| Minimum | \$54 | \$0 | \$140 | 823 |
| Median | \$116 | \$268 | \$335 | 17,852 |

Operational Metrics

- AOA Metrics
- Position and Salary Data–2006 (last update?)
- Insurance & Workers Comp.
 - Data Collection Ongoing?
 - Pooled purchasing
- CSU Budget Office
 - Mandatory Fee Data
- Operational Data
 - Anecdotal or Documented?
 - Agree upon metrics that can be quantified and shared
 - Size of data base is significant

Operational Metrics

- AOA Metrics
- The Power of Databases

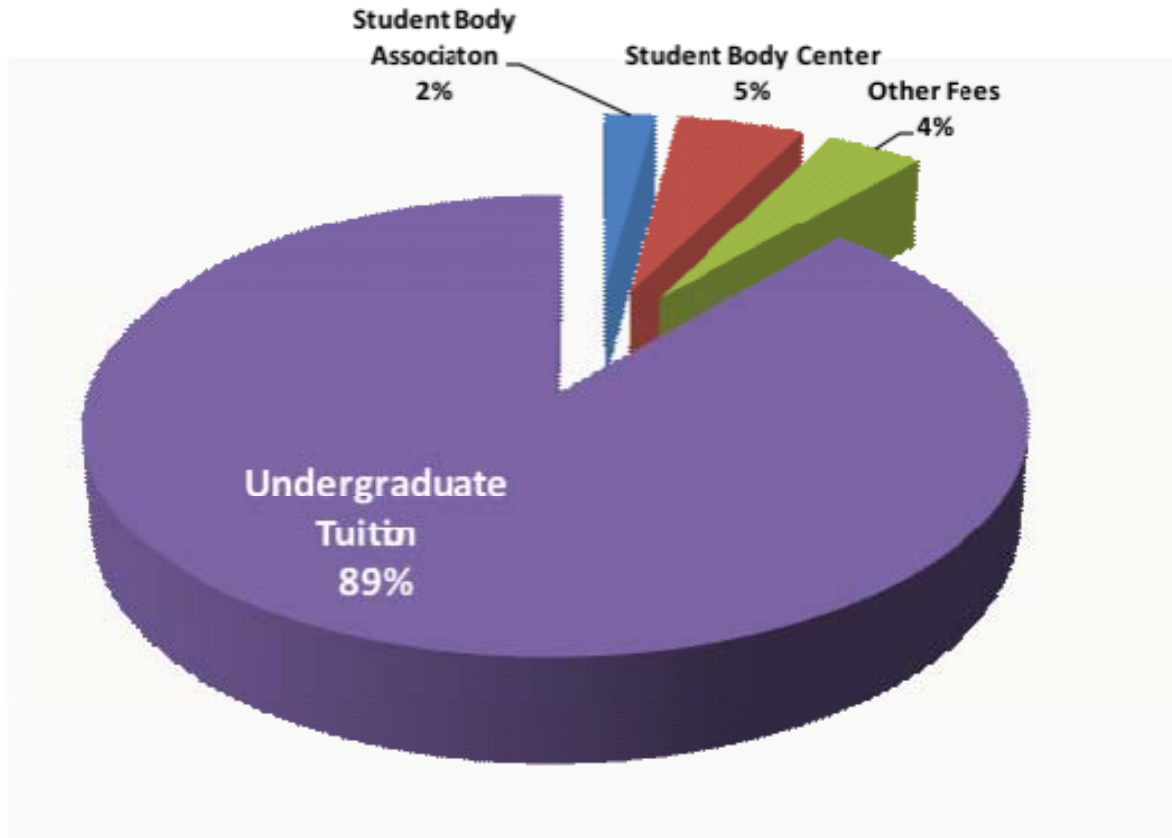
| Functional Areas | All Unions (n=83) Ave Enrollment = 18,129 | | | West / SW Unions (n=8) Ave Enrollment = 29,601 | | | Large Univ. (n=10) Ave Enrollment = 41,861 | | | San Diego State Univ. Enrollment = 35,832 | | |
|-------------------------------------|--|-----------|-----------|---|-----------|-----------|---|-----------|-----------|--|-----------|-----------|
| | ASF | %-Ttl ASF | ASF/Stdnt | ASF | %-Ttl ASF | ASF/Stdnt | ASF | %-Ttl ASF | ASF/Stdnt | ASF | %-Ttl ASF | ASF/Stdnt |
| Group 1: Food Service | 26,727 | 23.2% | 1.5 | 28,987 | 22.6% | 1.0 | 37,321 | 0.0% | 0.9 | 22,313 | 18.1% | 0.6 |
| Group 2: Ballroom Facilities | 10,487 | 9.1% | 0.6 | 12,236 | 9.5% | 0.4 | 16,586 | 0.0% | 0.4 | 20,520 | 16.7% | 0.6 |
| Group 3: Conference/Meeting Rooms | 10,591 | 9.2% | 0.6 | 13,194 | 10.3% | 0.4 | 19,478 | 0.0% | 0.5 | 11,648 | 9.5% | 0.3 |
| Group 4: Bookstore | 12,837 | 11.1% | 0.7 | 20,351 | 15.9% | 0.7 | 10,512 | 0.0% | 0.3 | 0 | 0.0% | 0.0 |
| Group 5: Additional Retail Services | 5,405 | 4.7% | 0.3 | 5,782 | 4.5% | 0.2 | 7,027 | 0.0% | 0.2 | 8,203 | 6.7% | 0.2 |
| Group 6: Theater/Auditorium | 5,287 | 4.6% | 0.3 | 5,289 | 4.1% | 0.2 | 6,702 | 0.0% | 0.2 | 6,000 | 4.9% | 0.2 |
| Group 7: Recreation/Entertainment | 6,637 | 5.8% | 0.4 | 7,400 | 5.8% | 0.2 | 14,804 | 0.0% | 0.4 | 17,900 | 14.5% | 0.5 |
| Group 8: Lounge Space | 7,313 | 6.4% | 0.4 | 9,453 | 7.4% | 0.3 | 15,031 | 0.0% | 0.4 | 7,957 | 6.5% | 0.2 |
| Group 9: Academic Related | 1,945 | 1.7% | 0.1 | 407 | 0.3% | 0.0 | 3,150 | 0.0% | 0.1 | 0 | 0.0% | 0.0 |
| Group 10: Student Organizations | 9,003 | 7.8% | 0.5 | 12,239 | 9.5% | 0.4 | 12,186 | 0.0% | 0.3 | 10,592 | 8.6% | 0.3 |
| Group 11: Administrative Offices | 10,930 | 9.5% | 0.6 | 8,453 | 6.6% | 0.3 | 18,905 | 0.0% | 0.5 | 10,178 | 8.3% | 0.3 |
| Group 12: Multicultural Centers | 1,908 | 1.7% | 0.1 | 2,746 | 2.1% | 0.1 | 3,741 | 0.0% | 0.1 | 1,572 | 1.3% | 0.0 |
| Group 13: Special/Misc. Components | 6,090 | 5.3% | 0.3 | 1,623 | 1.3% | 0.1 | 25,272 | 0.0% | 0.6 | 6,342 | 5.1% | 0.2 |
| Total Assignable Sq. Footage | 115,149 | | | 128,268 | | | 188,417 | | | 123,225 | | |
| Total Gross Sq. Footage | 179,194 | | | 196,417 | | | 291,362 | | | 174,980 | | |
| Gross/Net Ratio (Grossing Factor) | 1.54 | | | 1.53 | | | 1.59 | | | 1.42 | | |
| Efficiency Factor (% ASF/GSF) | 65% | | | 65% | | | 63% | | | 70% | | |

Operational Metrics

- AOA Metrics
- Revenues & Expenses
- Full Time Employees
- Per Student Costs
- Important Ratios
- Cal Poly Pomona – Initial Benchmark
- 2008–2009 Budget Year
- Fall 2008 Enrollment: 20,660
 - Residents: 1,800 (9%)
 - Commuters: 18,800

Big Picture Metrics

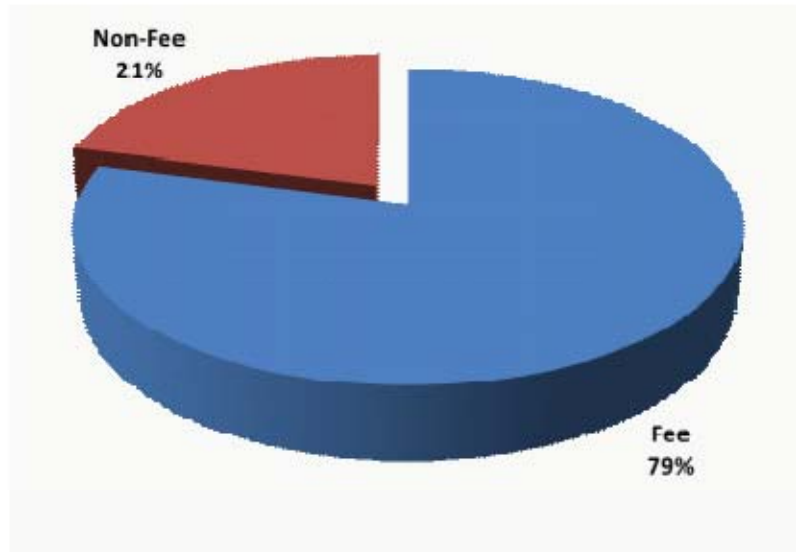
Cal Poly Pomona T&F Breakdown



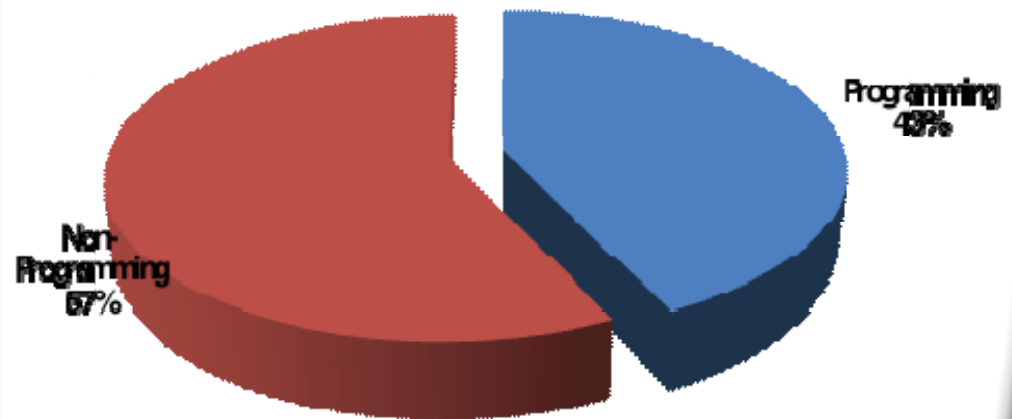
Operational Metrics

- Student Body Association Fee

Revenues



Expenses

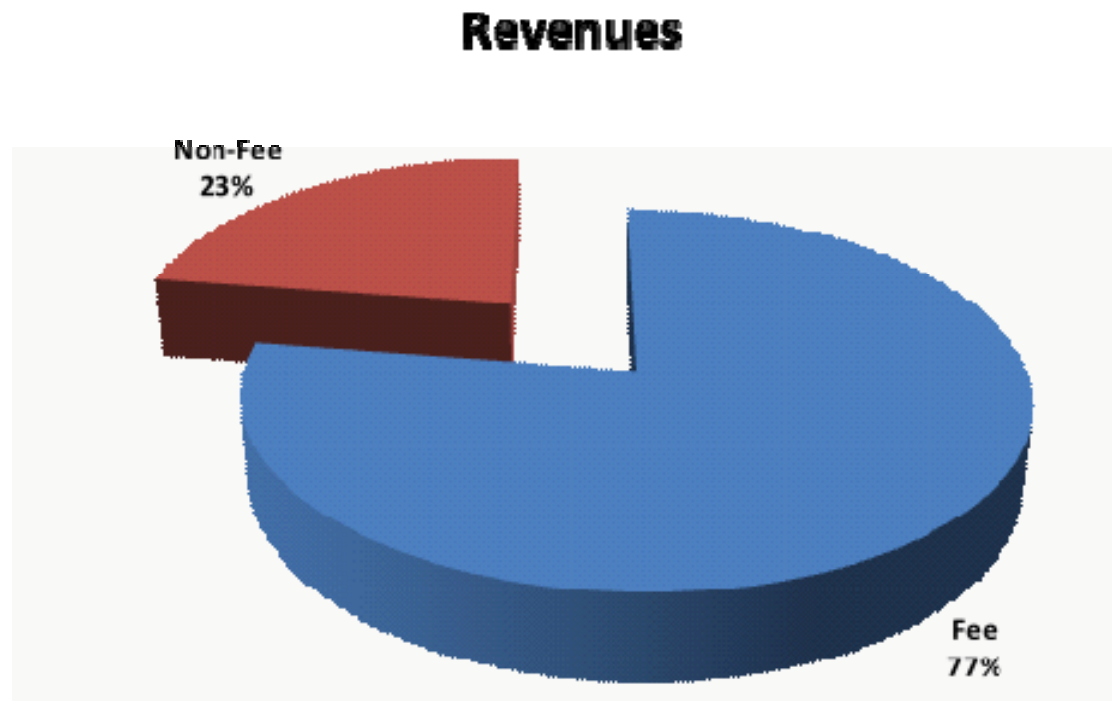


Operational Metrics

- Student Body Association Fee
- 1 FTE per 78 Resident Students
- 1 FTE per 810 Commuter Students
- 1.09 FTE per \$100K Revenue
- 1 FTE per \$46,500 Programming Expense
- \$52 per Student Programming Expense
- 1.07 Student Employees per FTE

Operational Metrics

- Student Body Center Fee



Operational Metrics

- Student Body Center Fee

| | Cost / GSF | % of Budget |
|-------------------------------|----------------|-------------|
| Administrative | \$19.19 | 51% |
| Programming | \$9.96 | 26% |
| Meeting / Conference Services | \$1.91 | 5% |
| Custodial | \$2.80 | 7% |
| Maintenance | \$1.77 | 5% |
| Utilities | \$2.01 | 5% |
| | \$37.65 | 100% |

Operational Metrics

- Student Body Center Fee
 - 1 FTE per 70 Resident Students
 - 1 FTE per 729 Commuter Students
- 1.55 FTE per \$100K Revenue
- 1 FTE per \$47,800 Programming Expense
- \$60 per Student Programming Expense
- 4.07 Student Employees per FTE
- 41,000 GSF per Custodial FTE
- 123,000 GSF per Maintenance FTE

Operational Metrics

- AS / Union

| Cal Poly Pomona | AS | Union |
|---------------------------------|----------|----------|
| FTE per Resident Student | 78 | 70 |
| FTE per Commuter Student | 810 | 729 |
| FTE per \$100K Revenue | 1.09 | 1.55 |
| Programming Expense per FTE | \$46,500 | \$47,800 |
| Programming Expense per Student | \$52 | \$60 |
| Student Employee to FTE Ratio | 1.07:1 | 4.07:1 |

Discussion

- Do We Have The Right Metrics?
- Should We Develop This Database Further?
- Present Data in January at AOA?

Discussion



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Discussion

Remember To:

- Challenge your assumptions
- Reassess / realign with mission statements
- Be resourceful