# BUSINESS OFFICER

NACUBO
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Expect the
Unexpected

Calm skies can suddenly turn chaotic—as can a well-running research lab or IT system—resulting in disaster on campus. Are your students, staff, operations, and facilities ready? Find out what one institution learned from a multiple-hurricane hit and how several colleges and universities are defending against biohazards, data hackers, and other potential threats.
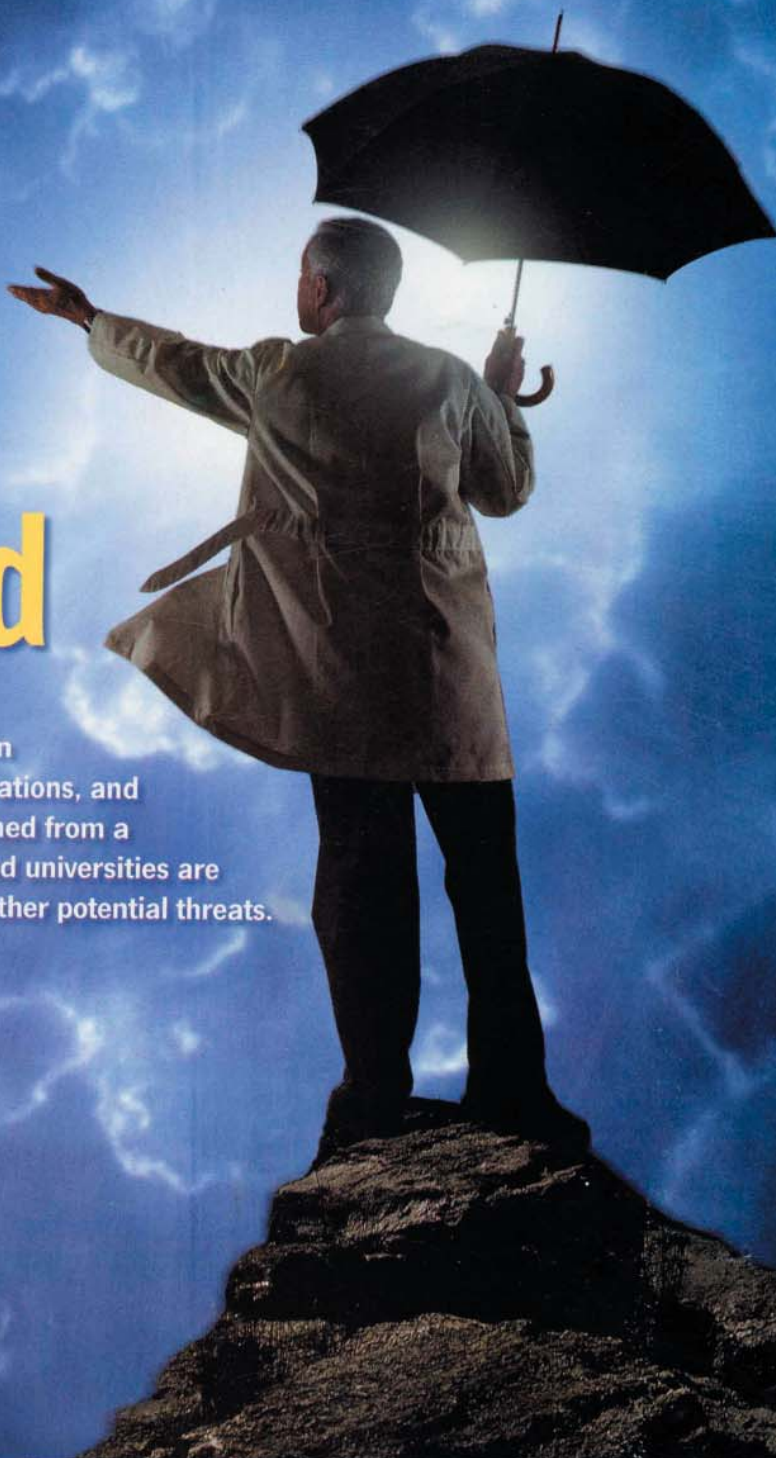
OPERATIONS
Before You Build...

Major construction on campuses is common, but is it always necessary, appropriate, and practical? Asking the right questions will help identify the risks, solutions, and management and funding strategies.

Putting a Project in Context

Understanding where a project stands in the context of the institution's purpose and priorities affirms its validity. Assessment involves three key questions:
- Is the project a legitimate priority for the institution right now?
- Can the organization's infrastructure support the project?
- What's at stake if the project fails?

Before embarking on an ambitious $200 million capital program, Wellesley College in Massachusetts looked at its internal planning and project management staff to assess whether it had the organizational infrastructure to manage the eight-year project. "We identified the roles required and realized that some roles internally had to be changed and we needed to look outside for additional support," says Pat Byrne, vice president for planning and administration.

Priorities were an issue at Clark University in Worcester, Massachusetts. Its athletic facilities, which had not kept up with competitor institutions, were scheduled to be upgraded. "We needed to add a new field house and upgrade and expand our outdoor facilities," says Jim Collins, executive vice president and treasurer. The university initially decided to tackle the outdoor facilities first. "But our planning consultant began asking some questions when we outlined our master plan. This caused us to re-evaluate our initial premises," says Collins. "It quickly became clear that there would be substantial savings if we could use soil that would be removed to construct the field house as 'fill' for the athletic fields." The institution decided to undertake both projects simultaneously.

When projects are viewed in the context of the broader institutional infrastructure, opportunities for economies of scale and efficiencies emerge. Once Clark knew that it would be economically advantageous to alter the sequence of its projects, the decision to move ahead was easy.

What influences whether a project succeeds or fails? Factors to consider regarding potential projects include financial or accreditation future, market competition, ramifications of a deferred maintenance backlog, and opportunities arising from a time-sensitive donor gift.

Getting a Lay of the Land

An organizational blueprint outlines the project, how much it will cost, what the goals are, and how they will be measured. Consider these four questions:
- What must be accomplished for the project to be a success?
- How were the underlying program assumptions confirmed?
- Have the budget and program been reconciled?
- What regulatory and physical constraints will influence the project?

Establish specific, measurable objectives for key project criteria, such as budget, program, schedule, and quality. Every project requires a program—a written description of needs in terms of people, equipment, and space. In reconciling the program, consider hidden costs such as bond financing, capitalized interest costs, permits, inspection fees, unsuitable soils, post-construction landscaping, and operating and maintenance expenses.

Identify the potential regulatory and physical constraints, investigate them, and develop an effective strategy for overcoming them. Clark University identified the pitfalls involved in undertaking its project sequentially. Constructing the new field house *after* installing artificial turf fields would have been difficult.

Determining the Players

Building projects require trust, collaboration, and decision making. At this stage of preparation, consider three questions:
- Who are the stakeholders and what role will they play?
- What kind of leadership will the project require, and who will provide it?
- How will decisions be made?

Stakeholders often bring competing agendas that can emerge at inopportune times. Craft a plan for managing expecta-

Business Briefs

New Professional Designation Lands In College Stores

Campuses are embracing a new breed of college retail professionals, thanks to a recent initiative by the National Association of College Stores. Last fall, NACS developed the Certified Collegiate Retailer (CCR) Program, creating standardized credentials for collegiate retailing professionals. Nearly one year after its inception, more than 60 campus professionals have been designated as CCRs.

The program has been very well received, according to Tony Ellis, director of education at NACS. He says the CCR designation appeals to a variety of people, including campus administrators, those interested in sitting for the exam, and stakeholders such as other Council of Higher Education Management Associations members. Further, Ellis says many institutional job postings now list the CCR designation as a preferred or even required qualification.

Representing more than 3,100 college stores nationwide, NACS developed the certification program to address changes in collegiate retailing and inherent expectations for the profession among higher education communities. The association

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> **Director of Education, NACS**

worked with various campus representatives, including business officers, to develop the certification program.

"To the extent that college store personnel report to the business office, this program gives administrators a valuable benchmark to evaluate the performance of their staff," Ellis says. Even for campuses with contract-managed or leased stores, the CCR designation is pertinent, he adds. This designation provides administrators with the added confidence that college store employees are meeting a specified level of knowledge for the profession.

RESOURCE LINK More information about the CCR program, including locations and dates for fall testing, is available at www. nacs.org. NACS will soon post its plans for the reaccreditation process.

Getting Certified

To attain the CCR designation, candidates must pass a 200-question multiple-choice exam demonstrating their mastery of content that is linked to six core industry competencies. These competencies cover college store operations; course materials and intellectual property; leadership and human resources; marketing and campus relations; retailing; and business stewardship. Upon successful completion of the exam, the designation is valid for four years. NACS is targeting those individuals with management responsibilities and three to five years of college retail experience, but Ellis notes that other employees are interested in the program to gain knowledge to advance their careers.

tions in advance to increase the odds of integrating their voices. While stakeholders offer advice and information, the leadership team makes decisions and provides direction consistent with the schedule.

At Babson College, Wellesley, Massachusetts, the board of trustees had established a facilities committee in 2001 to provide policy direction for campus construction and renovation projects, such as building a new undergraduate residence hall. "Our first step was to ensure that everyone was on the same level with respect to understanding how a design and construction project happens and

what parties play a part and when," says Shelly Kaplan, associate vice president, facilities management. "We used an afternoon meeting to define the players in the process—both external consultants and internal departments that had a role. Once everyone understood the process and that it entailed hundreds of individuals, the need to develop project goals and objectives became clear."

Babson's process was critical in establishing trust and understanding. The discussions helped the board feel confident that the administration was capable of handling the project and helped board members better understand their appro-

priate level of involvement, says Kaplan.

At Wellesley, the college created a new position of multiproject coordinator. "This person worked with individual project managers to ensure that all projects in terms of design, budget, schedule, and impact on college operations were within the construction team's view," says Byrne. Wellesley looked at its internal capacity and augmented it with appropriate outside resources, resulting in no costly surprises.

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