

President's Report

by Brooks H. Baker III

Fall Regional Meetings

The annual meetings of the APPA regions are always exceptional events featuring educational programs and opportunities for peer networking and great value to those attending the meetings. This year, I was able to attend two of the APPA regional meetings, CAPPa and PCAPPa. Unfortunately, my trip to RMA had to be cancelled, but Past President Gary Reynolds attended their meeting held in Sedona, Arizona.

The PCAPPa region covers a diverse geographical area reaching from the southern tip of California to western Canada and from Hawaii to Nevada and Idaho, but its members have a camaraderie and fellowship that was tremendous. Towny Angell and his group from Reed College did a magnificent job of hosting and the business meetings had John Wong of the British Columbia Institute of Technology at the helm. The meeting went smoothly and everything was accomplished in a very cooperative setting. With Chris Christofferson of Stanford University as the incoming president of PCAPPa, they will have an experienced leader at the helm throughout this year.

The CAPPa region met in Corpus Christi and made me feel like part of the family when I arrived. Ron Smith and his group from Texas A&M University did an excellent job hosting the event, and Art Jones, CAPPa President, ran a great meeting. The strength and health of CAPPa was evident in their lively discussions over revisions of their Bylaws and through the general attitude and atmosphere that was experienced at this meeting.

Annual AUDE Conference

The annual conference of the Association of University Directors of Estates (AUDE) of the United Kingdom was held this year at the University of Manchester Institute of Science and Technology (UMIST) in the midst of the city of Manchester, England. The UMIST conference center was a wonderful location for this meeting since the trade show, educational meetings, and overnight accommodations were all in the same building. The meeting was well attended and included guests from several countries outside the United Kingdom.

In typical AUDE style, the closing banquet was a black tie affair in a beautiful setting. The banquet was held in what appeared to be a convocation building at the campus of the University of Manchester, located adjacent to UMIST. The grand hall where we dined was awesome with a cathedral-like pipe organ and beautiful architectural features. We were entertained by a truly wonderful string quartet called Palm Court during the meal—what a treat! Leave it to the British to overwhelm you with their class and style.

Mike Stacy was a wonderful host to us during our stay in Manchester and arranged for our special needs in a gracious manner. Simon Britton is the new chair of AUDE as Andrew Nightingale stepped down from his term of office.

We were invited to attend the Algemene Vereniging Schoolleiders (AVS) conference in the Netherlands while we were in that area of Europe, so we stopped by for a couple of days of their conference. The AVS group had questions about the management of deferred maintenance, outsourcing,

and other topics related to the business of facilities management. Approximately 1,000 members attended, representing mostly secondary schools.

GAPPa

This report would not be complete without commenting on the Georgia APPA (GAPPa) meeting held in Jekyll Island, Georgia. Ed Rice was the official APPA representative, but Lee Richey with GAPPa was kind enough to invite me to be the keynote speaker. As always, the GAPPa meeting was a great event with camaraderie, fun, a great educational program, and with many business partners in attendance.

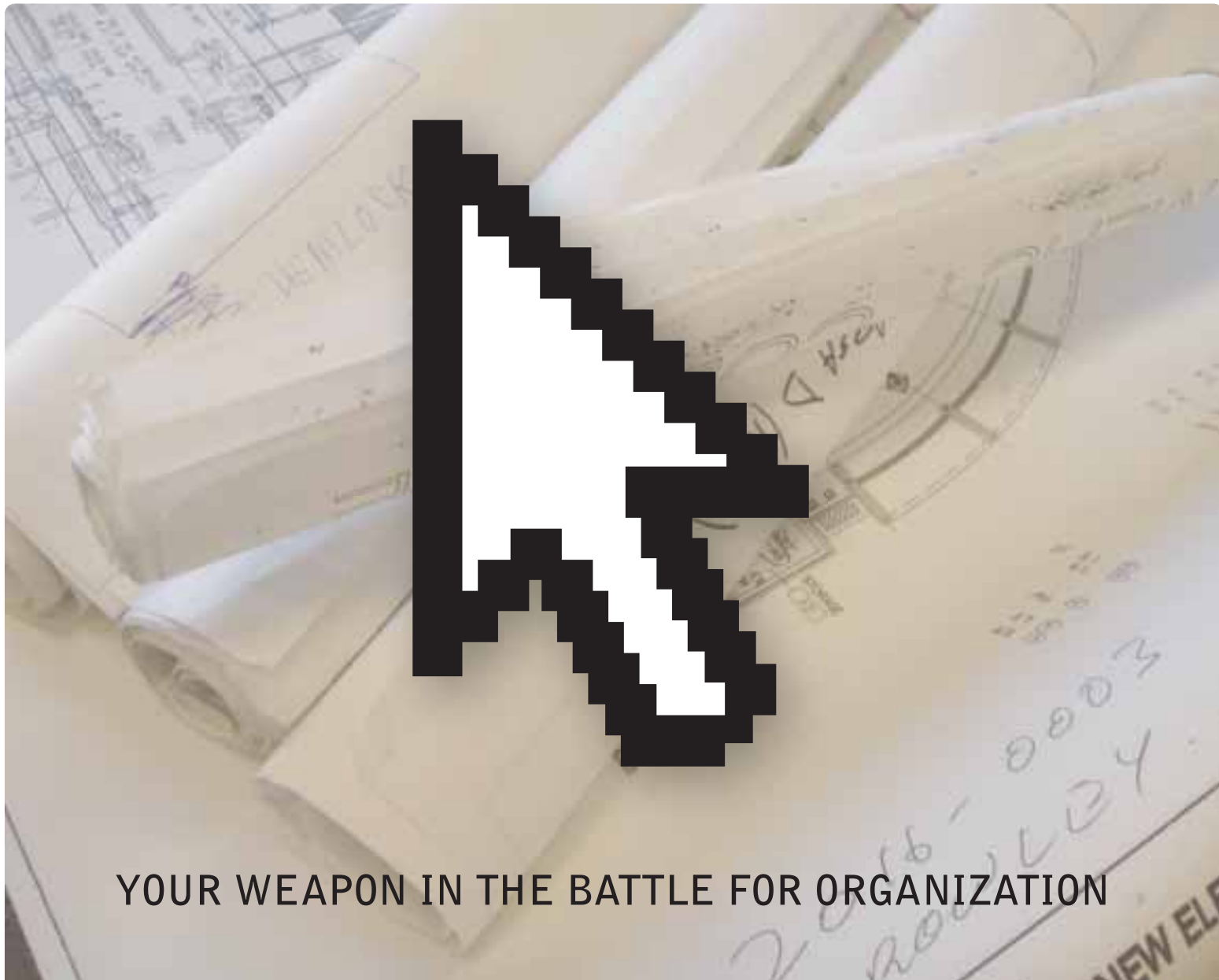
Other Comments

This year also brought a new relationship into existence with members of the newly created Tertiary Education Facilities Management Association (TEFMA) formed by many of the former members of Australasia APPA. We have forged a strategic partnership with TEFMA and will continue close relationships with this group as they move forward to nurture and develop their own association.

Mexico APPA is still moving forward as it continues to strengthen its numbers and provide valuable educational offerings for those participating institutions in Mexico. We look forward over the coming months and years to strengthen this relationship with our friends in Mexico and being able to provide them with APPA resources as well as learning from their experiences in higher education facilities management.

APPA is healthy financially and in its attitude. The exuberance of the volunteers and their willingness to

Continued on page 8



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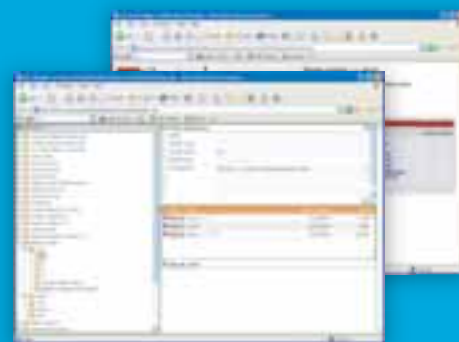
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Continued from page 6

devote many hours to the association bode well for the coming year. A highly skilled and motivated staff in Alexandria provides the association with tremendous support with a great attitude and with dedication to what they are doing. With the introduction

of a new training program, Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision, the Center for Facilities Research (CFaR), a renewed Strategic Assessment Model, and all of the other positive things that have happened in the last year or two, APPA will grow in numbers and in

influence and will continue to be the Association of Choice for Educational facilities professionals.

Once again, thank you for enabling this country boy to be of service to the association for the past year as your president. It has been a delightful experience.

Immediate Past President's Report

Philip L. Cox

As I prepare to transition off the APPA Board of Directors, something I really do not wish to think about because I am going to sorely miss my Board involvement, I thought I would pass along a few observations.

APPA is in remarkably good health considering the economic stress it has endured over the past two to three years. Through hard work and careful attention by the Board and especially the staff, our association has weathered the economic storm while at the same time undertaking some remarkable initiatives. While many associations hunkered down to get past the economic challenges we presently face, APPA has courageously forged ahead with such initiatives as the Center for Facilities Research (CFaR) and re-tooling the annual meeting into the Educational Facilities Leadership Forum. To me, these initiatives illustrate the style of APPA's leadership. It would be easy to subscribe to the philosophy of "if it ain't broke, don't fix it" or "go with a winner"—especially in times that are calling for caution. Not APPA. Rather, our association, looking for continuous improvement, is continually testing assumptions about the relevance of our membership services in an environment of shifting stakeholder requirements. By staying nimble and flexible, our association is able to respond to members' changing needs.

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At a time when there are several issues competing for APPA's time, resources, and energy, it is my firm conviction that our #1 priority is our membership. We must never become complacent about our membership base. For it is our membership that pays the dues that allows us to operate; it is our membership that purchases our publications; it is our membership that attends our training offerings; and most importantly, it is our membership that makes up the wonderful body of people with whom we associate.

It has been gratifying to me during my years on the Board to observe that APPA has become a more inclusive organization. We now have provisions for individuals to become members of APPA. Also recognizing that one size does not fit all, member institutions can now designate whomever they chose—direct paid employees or contractor employees—to represent them as institutional representative. We have also extended voting privileges to affiliates. We now formally recognize state, provincial, and local chapters. And, perhaps as a terrific way to assure succession in our profession, we have recognized and welcomed into our ranks student chapters. To me these changes represent steps to increase APPA's diversity. And while we still have a long way to travel on our journey to greater inclusiveness, these initial steps signal to me that we are headed in the right direction.

Being a "global partner in learning" calls to mind the aspect of our geographic diversity. APPA is paying careful attention to our international members and guests—realizing that if we are to truly partner on a global scale, we must be better versed in how to interact with these partners. It is now possible for international organizations to engage with APPA on several levels, beginning at an infor-

mal level and going all the way up to a strategic partnership. Further, APPA now has an international protocol policy and a staff member serving as the protocol director, all of which are intended to make our international visitors feel more welcomed and included in our meetings and events.

As a long-time observer of the APPA Board of Directors, it appears to me that the Board has struck an optimum balance in the devotion of its time and energy between strategic and tactical issues. That is, the Board, rightfully so, devotes much of its attention to long-term strategic matters while relying heavily on trusting partnerships with the staff and committee members to lead the tactical efforts. Not only does this speak well of the Board for doing the right things, but it is also an indication of the trust that has been earned by outstanding staff members and the dedicated, hardworking committee members.

One final observation, if you will permit the musings of a lame duck. Some experts argue that it is better for leaders to keep their professional and their social lives separate. Whether you agree with this advice or not, you might at least agree that it is not always easy to accomplish. However, with APPA, I have felt blessed to be able to combine professional and personal facets of my life in a perfect union. While pursuing my professional interests and personal development in APPA, I have made many, many lifelong friends from literally around the world. These associations and friendships are what I will most cherish about my involvement in leading this superlative organization. Thank you for the privilege and honor.

President-Elect's Report

Edward D. Rice

It has been a very busy year, starting last July when I took the oath of office along with the other APPA Board members in Nashville, Tennessee. The remainder of 2003 was taken up with attendance at the Australasia Conference in Adelaide, Australia; the CAPPa annual meeting in Corpus Christi; the Missouri APPA meeting in Columbia; the Florida APPA meeting in Daytona Beach, and finally the Georgia APPA meeting at Jekyll Island. The enthusiasm and pride our membership has for this truly unique business of higher education facilities management is tremendous. There is a great thirst to learn and become the best of the best.

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And by participating in APPA, one has the potential to excel in this business.

In reading and listening to the stories of successful members who came from nowhere to become the top in their organization and also leaders in APPA is inspiring. Don Mackel and Ron Flinn had humble beginnings in our facilities but went on to become APPA Presidents. How did they do it? Through their association with APPA and with membership in APPA they became professionals in the field of higher education facilities management. For an individual to become successful in our profession, a great first step is to become associated with APPA.

As an example, one only has to look at the association's history beginning in 1914 when the first meeting was held in Chicago. A history of

APPA written in 1988 for the 75th annual meeting and printed in the summer issue of *Facilities Manager* provides insight. In the article Bruce Rutherford states, "APPA provided the opportunity to meet with and talk to some of the best people in the business and to pick up new ideas and procedures."

The "opportunity" is still there today and even more dramatic because we have more experienced and educated members today that can and will let an individual have access to their experiences.

In 1922, Roy Lund started at the University of Minnesota as a draftsman. In 1927, he attended APPA's annual meeting at the University of Minnesota. Lund recalled, "There were about 15 present and the meeting was mostly "bull" sessions.

Discussions were mainly on custodial problems, painting, classroom lighting, and watchman services." Lund retired from the University of Minnesota in 1970 as assistant vice president and director of plant services.

Today we still have custodial and painting issues, but the lighting is about energy management and watchman services are security issues. The issues are nearly the same as they were in 1927, yet they are more complex because our methods of doing business are far more technical and defined and our employees have more rights and autonomy in performing their work. Still, we have the need to meet and interact with our peers which is the strength of APPA—in bringing together people of the same profession to exchange thoughts,



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ideas, and to learn how to be the best of the best.

This will be an exciting year for me and I look forward to working with each of you.

Secretary-Treasurer's Report

Robert J. Carter

In the fiscal year ending March 31, 2004, the floundering economy caused financial challenges for the Board and the APPA staff. I am pleased to tell you that, in spite of these challenges, APPA ended the year with a surplus. This is due in no small part to the proactive actions of the APPA staff in controlling expenditures and pursuing additional revenue sources as well as fiscally prudent planning by the Board.

The first graph on page 12 shows the six-year history of revenues and expenses for APPA. The budget surplus at the end of this fiscal year was \$171,518 including \$62,941 of unrealized value gain on equity investments. Of this surplus, \$108,000 was put into APPA's capital and operating reserve fund. These reserves now stand at \$848,000 or 77 percent of the \$1,100,000 goal that represents 25 percent of the operating budget and 10 percent of the estimated replacement value of our physical assets such as the headquarter building and equipment.

APPA's equity investments ended the year with a positive return as mentioned above. This resulted from the rebound in the equity markets given the losses of the last few years. The Board's objective for this portion of the reserve is long-term capital appreciation, therefore, fluctuations in returns are expected and considered normal.

There are several factors that affected our financial performance. The slight decline in membership of the past few years seems to have stabilized

resulting in a small increase in revenue from membership dues. Sales of APPA publications and advertising in *Facilities Manager*, presenting leading edge educational programs including the newly added Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision, and the Facilities Management Evaluation Program (FMEP) remain strong. The revenues generated from the above activities coupled with tight control on expenses by the APPA staff have resulted in a healthy surplus exceeding the budget in a difficult economic climate. I cannot stress enough how fortunate we are to have such a competent and motivated staff. The revenues for the year by category are shown on the second graph.

The third graph indicates how APPA expends funds to achieve our mission of supporting educational excellence with quality leadership and professional management through education, research, and recognition. APPA uses the majority of its revenues to fund education, member services, and publications. However, expenses for electronic communication and information delivery for members are growing. It is important that APPA continues to fund this type of activity adequately so that we keep pace with the technology required to deliver many member services efficiently and effectively.

The meeting minutes of the Board of Directors provide further information on APPA activities during the past fiscal year and can be found at www.appa.org/leadership/board/minutesmain.cfm.

Vice President for Educational Programs

James O. Roberts

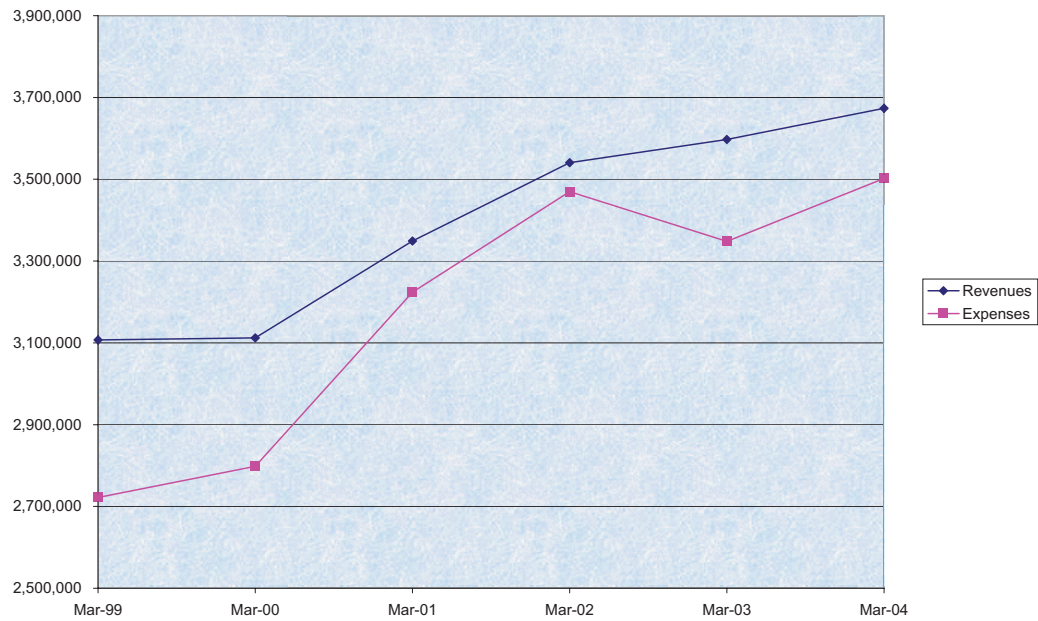
We are continuing to look at new ways to deliver and provide for the educational needs of the membership. I should always start with a sincere thank you to the APPA staff. Also, Lander Medlin does not get the recognition she deserves. Her leadership and strength makes our organization one that is emulated by many across this realm of higher education. Suzanne Healy has taken the reins of meetings, conventions, and education and is superior at providing direction and details for all our educational events. We would not be able to have such wonderful programs without her work and support.

The Education Committee, composed of representatives from each region, and the leadership of the Institute for Facilities Management and the Leadership Academy continue to be the best and hardest working committee at APPA. I am allowed to say that because they work with me. We have wonderful meetings; the commitment of each of the members brings vigor and freshness to the table each time we meet. Thank you Anita Bailey, ERAPPA; Dewey Yeatts, SRAPPA; Ralph Zia, MAPPA; Pat Apel, CAPP; Polly Pinney, RMA; Mark Hunter, PCAPP; Jay Klingel, Institute Chair; and Doug Christensen, Leadership Academy.

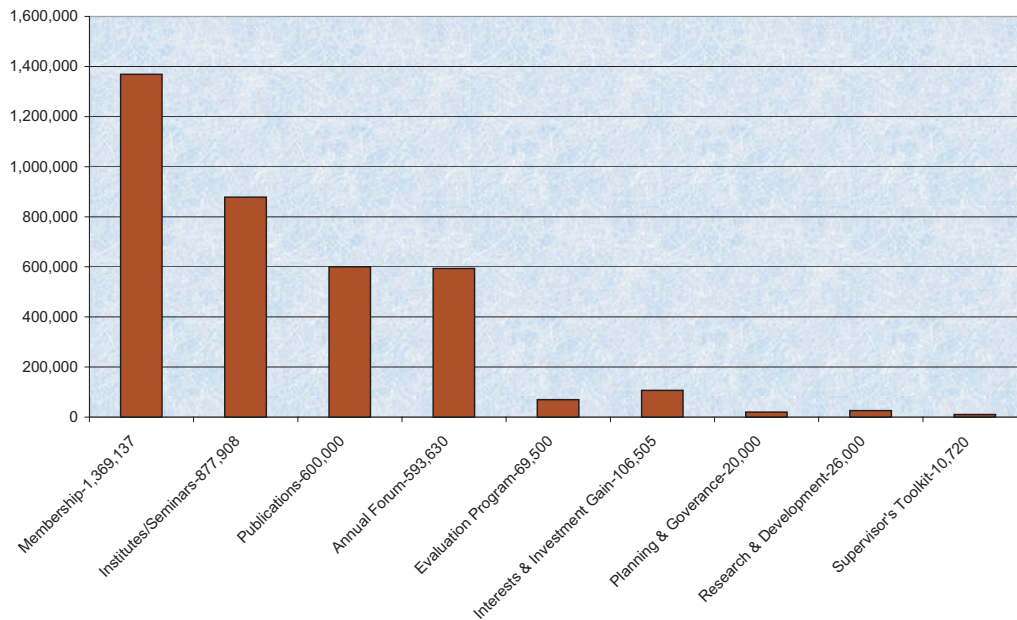
We are excited about the Educational Facilities Leadership Forum and its locations for the next three years—Washington, D.C., Orlando, and Hawaii. It doesn't get much better than that.

Our programs this year have been some of the best in recent memory. We continue to have an excellent attendance and participation with all our endeavors. This can be attributed

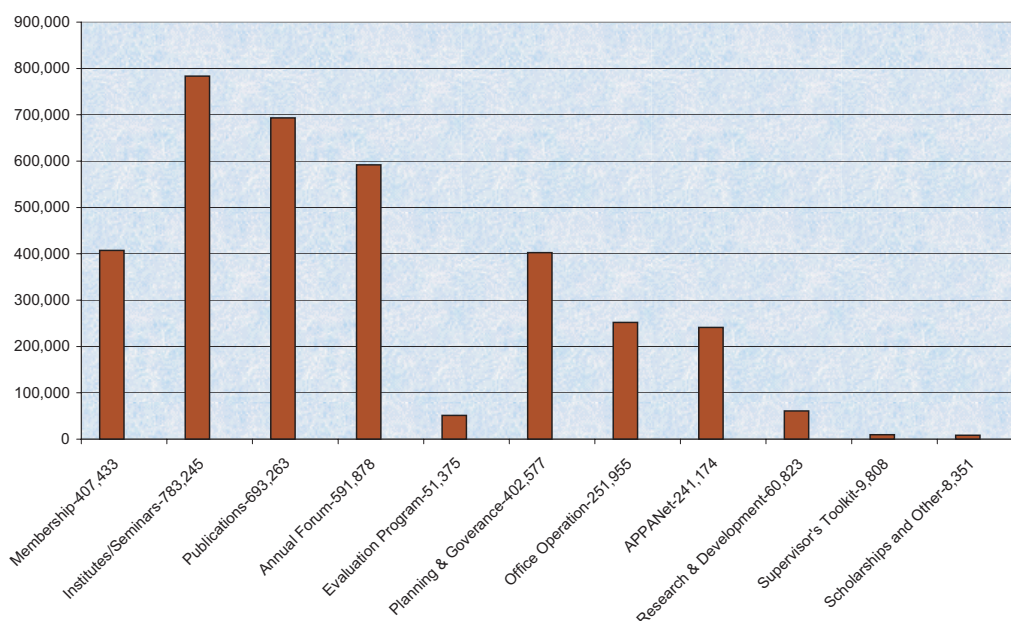
Graph 1. APPA's History of Revenues and Expenses



Graph 2. 2003-04 Sources of Funds (Revenues)—\$3,673,400



Graph 3. 2003-04 Uses of Funds (Expenses)—\$3,501,882



to the staff at the APPA office and the quality of our presenters.

We have addressed Competency, Collaborative Relationship Building, and Credibility. In all that we do, these desired outcomes are at the heart. This allows us to continue to follow the APPA Strategic Plan. We intend to continue to be viewed as the leader in education for facilities management.

2004 Educational Facilities Leadership Forum

At this writing, registration is under way and plans are solidly in place for an excellent meeting in Washington, D.C., July 25-27. The location is the Wardman Park Hotel across from the National Zoo. The educational programs are impressive. Following the leadership of President Brooks Baker, we are directing our efforts toward regulatory compliance and code advocacy. We will continue to provide different presentation styles, including round table discussions as well as different topics for your choosing.

Special thanks go to all that are contributing to this event.

Institute for Facilities Management

This has been an excellent year for the Institute for Facilities Management. Jay Klingel from the University of Virginia continues to serve as our Institute chair and the Dean of the Maintenance and Operations section. We have a new Dean, Cheryl Gomez, also from the University of Virginia. She will be serving as our Dean of Energy and Utilities. That gives us a strong administration that continues to include Don Guckert from the University of Iowa heading up Planning, Design, and Construction, and Mary Vosevich from the University of New Mexico as our Dean for General Administration and Management. Mo Qayoumi, California State University, Northridge, has retired as Dean of Energy and Utilities after more than 20 years of service to APPA, and his retirement should not go without notice. He is a wonderful resource and

provides tremendous talent that is openly shared with all his students.

This program continues to amaze me. It is by far the most popular program offered by APPA and registrations online have made it more efficient and even quicker to fill each session. We will continue to have excellent programs in the years to come.

Leadership Academy

We are in the fifth year of this program and this past June it was held in Ft. Lauderdale, Florida. The three programs within the Leadership Academy focus on building leadership skills in continuing steps. These steps include personal skills, organizational skills, and professional leadership skills. Our thanks continue to go to Doug Christensen who chairs the Leadership Academy. With the support of Bill Daigneau and Gary Reynolds, this program is recognized as leadership training for all education fields, not just facilities management.

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Final Thoughts

Without a doubt, serving as the vice president responsible for educational programs for APPA has been one of my most rewarding professional experiences. In the past four years we have continued to provide some of the best programs available to facility professionals. I wish to thank the former APPA Presidents with whom I have served—John Harrod, Gary Reynolds, Phil Cox, and Brooks Baker. Each of these men has been supportive and encouraging while providing leadership and direction that will continue to reap benefits for many years to come. In 1988, then SRAPPA president Diane Kerby asked if I would serve on the SRAPPA Board as secretary treasurer. Little did I know that it would be a journey that would lead me to serve as an APPA Vice President. Thank you for your confidence and support. I look forward to the future of these programs under the leadership of Sam Polk. You are in excellent hands and I am convinced that his leadership will take APPA's Educational Programs toward an even brighter future.

Vice President for Information and Research

Vickie Younger

The Information and Research Committee has been working very hard this year to have a new survey tool available for the fall collection time. Laura Long of LTL Collaborative has been of tremendous help to us as we worked through format and definitions for the new tool.

Publications

This past year APPA introduced Web-based downloads of all 67 chapters of *Facilities Management: A Manual for Plant Administration*, third

edition, published *The Building Commissioning Handbook*, second edition, by John Heinz and Rick Casault, and *Field Notes: Commentaries on Leadership and Facilities Management* by Jim Christenson.

Others publications planned are an anthology of articles on the topic of Customer Service pulled from *Facilities Manager* and Forum papers; an anthology of articles on the Quality Work Environment; an anthology of articles on Planning, Design, and Construction; and an outsourcing/private publication. Marketing is clearly tied to sales and we continue to promote all APPA publications.

Facilities Manager continues to be a foundation for communication with our membership and others. Much praise goes to the staff and contributors for making it such a quality publication. Topics and contributors are always welcome. Please consider making *your* contribution.

Website and Technology

Web usage continues to increase and various Web trends reports helped us determine the current level of activity. Among the points noted on these reports include: 111,953 visitors in a one-month period, with 15,529 unique visitors. The Resume Bank and Job Express were the top requested Web pages, followed by *Facilities Manager* and the education site. A site map will soon be present, as we continue to hear that some people do not find our site to be "friendly and easy to navigate." Printer-friendly pages will also soon be an option for users.

The APPAinfo discussion list now has 985 subscribers. The traffic indicates that this tool is appreciated and valued by our membership. We are going to further explore cleaning up this information to help get rid of some of the "garbage" that accompanies many messages.

CCAS/SAM/Other Data Collection

Participation in the CCAS and SAM surveys has declined in recent years, yet the need for quality facilities research is on the rise. Laura Long met with the committee and helped us through questions, trouble areas, and other information related to our next data collection. She presented a blueprint for a consolidated data collection process. This would mean that we would move away from submission of information just for CCAS or SAM or other specific report and provide information that is part of several "modules." Among these would be 1) general data about institutions; 2) operating cost data; 3) strategic financial data; 4) process data; staffing. Other modules would vary dependent upon research questions being raised and 5) customer satisfaction; 6) innovation and learning; and 7) process-level self-evaluation would cover SAM specific topics. A new kind of publication(s) would result with more focus on ability to compare to peer institutions. A personalized report with historical perspectives will be a valuable incentive for participating in the survey. Raw data with tools to manipulate them would be a great plus, as well as a PowerPoint presentation or Excel spreadsheet on the results.

The committee decided that many of the data points that we use are actually performance indicators and we wanted to give these points a name that will reflect both what they are and how they might be used. **Facilities Performance Indicators** will be the official title for these points.

Final Notes

We determined that we would focus on current and future data for information on the website, but after getting this together we will then add up the past five years of data and have

it roll off—maintaining just the current five years. If we hear from members and/or researchers that we need more or less, we will adjust.

As I complete my terms as Vice President for Information & Research, I want to thank the committee mem-

bers who have been so supportive this year—Jerry Hill, ERAPPA; Randolph Hare, SRAPPA; Fred Plant, MAPPA; Scott Turley, CAPP; Harvey Chace, RMA; Debbie Aquilar, PCAPP; and Maggie Kinnaman, At-Large.

Vice President for Professional Affairs

Alan S. Bigger

The past year has been exciting, invigorating and a learning experience. Due to the incredible support of the APPA staff and the nurturing nature of the APPA Executive Committee, the transition from Mike Besspiata to the current vice president was relatively smooth and significant milestones were achieved throughout the year. It would be a grievous error if it was not noted for the record that the primary reasons for the effective transition were the hard work and detailed records of Mike Besspiata and the patience and professional assistance of Francine Moore of the APPA staff. The members of the Professional Affairs Committee (PAC) and the Awards and Recognition Committee (A&R) are hard working and dedicated and were a delight to work with throughout the year.

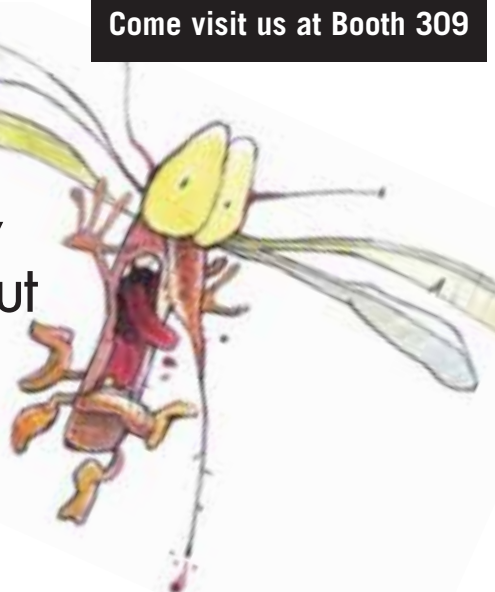
Facilities Management Evaluation Program (FMEP) E-Manual

The E-Manual is in the final stages and will be available for FMEP team members as of July 2004. It will be in a downloadable file format so that it can be readily accessed by future FMEP team members.

The facilities management training program will be launched in conjunction with the 2004 Forum. The concept of this training program is that members of FMEP teams would attend a training session before joining a site visit team. The E-Manual will be used as the training guide at the Forum and will also be used as a reference tool for team members prior to and during site visits. The objective of the training program and manual is to provide consistency in site visits, enhance the professionalism of the

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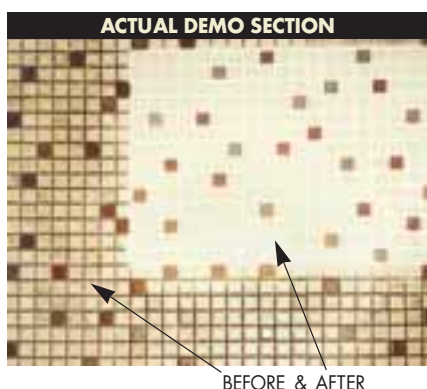
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Strategic Partnerships

During the past year, the APPA executive staff and PAC have been working on developing strategic partnerships with two groups, the American Society for Healthcare Engineering (ASHE) and the International Sanitary Supply Association (ISSA). The plan is to bring recommendations to the APPA Board to move forward on finalizing strategic partnering agreements with both organizations. To continue to test the waters of such a partnership with ASHE, APPA trainers will present five management training sessions at the ASHE conference this summer. There will also be joint sharing of articles in the official magazines of each group. ASHE has already made a significant contribution to APPA by underwriting the participation of Doug Erickson with the APPA Board and PAC. The International Sanitary Supply Association has committed to sending three members of their staff to the 2004 Forum and has already sent one to the APPA Institute. On a test basis, ISSA has invited APPA to present the Supervisor's Toolkit training program at their national convention this fall in New Orleans. ISSA is providing a booth for APPA at this meeting where it is expected that 18,000 people will attend from around the world.

Code Advocacy

Thanks to the mentoring and tutoring of Brooks Baker, APPA President, and Doug Erickson, ASHE representative, mammoth strides have been made in the area of code advocacy. Introductory columns and articles have been or will be published in *Facilities Manager* and two code advocacy training sessions will be conducted at the 2004 Forum. Strengthening relationships with

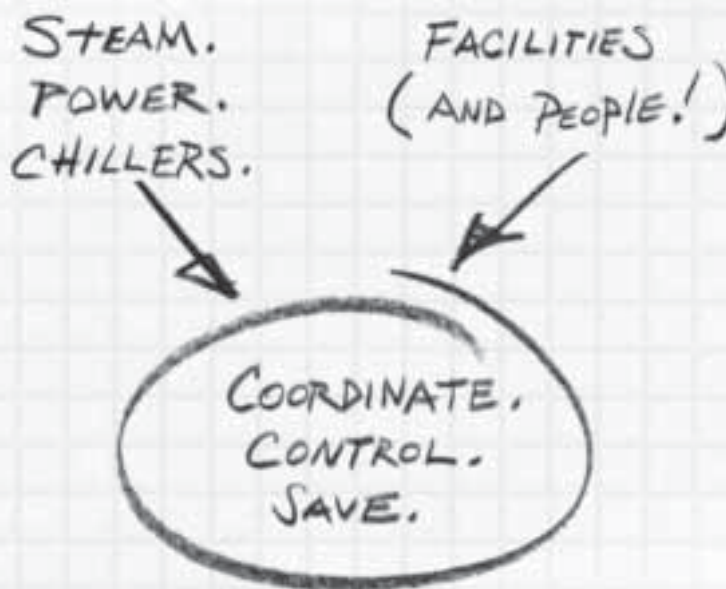
organizations such as ASHE and ISSA will increase the visibility and credibility of APPA.

Award Submissions

At the Forum last year, all Board members, regional presidents, and the general membership were encouraged

to nominate persons for the various award categories. To date, the limited number of submissions indicate that more work needs to be done in soliciting quality nominations. The new APPA Fellow designation will be presented to three excellent candidates at the Forum, and we anticipate that the

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numbers of persons to be awarded this honor will continue to grow.

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- Craig Bohn – RMA
- Kevin Folsom – CAPP
- Paul Smith – RMA
- Al Stoverink – CAPP

Meritorious Service Award

- Chris Ahoy – MAPPA
- Mo Qayoumi – PCAPP
- Leo Yanda – CAPP

APPA Fellow (First year)

- Doug Christensen
- Bill Daigneau
- Jack Hug

The awards programs of APPA are many and varied and with the emphasis on personal leadership, diversity, and membership growth, it behooves all of us to become aggressive ambassadors for these programs.

Online Award Submissions

This year most of the submissions were completed online. The members of PAC and A&R were able to transmit their scores for the awards to the Chair and then the Chair was able to bring consolidated score sheets to the meetings in the spring. This greatly assisted the committees by providing a discussion document for the awards meetings and expedited the decision-making process.

Action Items

A&R has proposed the following Bylaws change to the APPA Board and the APPA Executive Committee. The following statement would be added to Article III:

“Past recipients may not be re-nominated within 10 years. Eligible accomplishments and contributions will be evaluated on achievements since the award was last received.”

This change will afford members that have continually served APPA for many years with an exceptional level of excellence to be recognized in a meaningful manner.

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A Final Note

Much has been accomplished this year and the potential for growth in various areas is exciting. During the coming year, in addition to the normal functions of the committees, Professional Affairs—Joe Rubertone, ERAPPA; Mike Davis, SRAPPA; Greg Fichter, MAPPA; Bob Hutton, CAPPA; Eakle Barfield, RMA; Dan Johnson, PCAPPA; and David Cain, At-Large, and Awards & Recognition—Kenneth Bolig, ERAPPA; Gary Shumaker, MAPPA; Ron Brooks, SRAPPA; George Stumpf, RMA; and Darrel Meyer, CAPPA will need to concentrate on recruiting new members for the committees and developing a strategy to increase the visibility of the various awards programs.

Executive Vice President's Report

E. Lander Medlin

At this writing, it appears that the economic picture of both the federal and state governments is improving compared to the past three years. However, the tight financial grip on the higher education community remains unparalleled. Although many state government budgets are showing signs of revival and the stock market is on the upswing, the impact on college and university appropriations, endowments, and private philanthropy remains troublesome for both public and private institutions. Fortunately, APPA continues to hold its own as the “association of choice” by its members to meet their professional development needs.

One measure of that support is our financial stability. Our diverse portfolio of programs, products, and services continues to serve us well. We are pleased to report a year-end surplus of \$108,418. These monies

have been placed in our operating and building reserves funds representing 77 percent of our long-term, board-directed cash reserves goal. We are also pleased to report that most categories of our conservative, yet focused, budget achieved or exceeded the targets set for revenue generation

and expense minimization. Nevertheless, the Board and the staff have a sharp eye on the future and have established another lean budget for the coming year. The fragile financial state at our educational institutions and, correspondingly within the facilities departments weighs heavily on

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our minds and remains an important factor in our decision making.

Our strategic plan remains a valuable and viable resource providing consistent and predictable guidance, direction, and focus during these turbulent times. And, we continue to make significant strides in achieving the strategic plan's three desired outcomes of competency, collaboration, and credibility.

Competency

The guidelines and standards established by your colleagues over the past several years remain invaluable tools for resource allocation and strategic planning. If your resource library does not include the 2001-2003 *Comparative Costs and Staffing*

report/Strategic Assessment Model's financial performance indicators, the trilogy of staffing guidelines for the custodial, trades, and grounds areas, and the *Environmental Compliance Assistance Guide for Colleges and Universities*, you should quickly ensure that it does.

In addition, I highly recommend the latest titles of *Planning and Managing the Campus Facilities Portfolio* and the *Building Commissioning Handbook, second edition*, along with the new monograph titled *Field Notes* by James Christenson. Jim's monograph represents an important primer on leadership and management. Further, the availability and flow of relevant information regularly occurs via APPA's bimonthly magazine, *Facilities*

Manager; Inside APPA, our bi-weekly electronic newsletter; our website, www.appa.org; and the APPAinfo discussion list that boasts close to 1,000 subscribers.

CFaR, APPA's Center for Facilities Research, is resident on our website and fills a vital need by integrating the development, collection, and delivery of research in the education environment. Active participation in and involvement through CFaR by facilities professionals, allied associations and agencies, and other education community stakeholders is increasing the quality and quantity of credible data and information you need to make knowledgeable and informed decisions for your institutions. CFaR is designed to be a repository of edu-

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cational facilities-related information. The research collected and sponsored by CFaR will provide compelling information to a number of key constituencies and educational stakeholders. We began the year with ten submitted research projects—four have been completed. In addition, APPA is sponsoring its own major research project that we have preliminarily titled the Strategic Investment Model (SIM). SIM is intended to demonstrate the importance of integrated resource planning and management for both capital development and renewal/maintenance of all facilities. The model should stimulate good decision making around capital development and maintenance/renewal.

The content and appeal of APPA's vast array of educational programs (Institute for Facilities Management, Leadership Academy, and the annual Educational Facilities Leadership Forum) continue to provide members with the professional and personal growth and development needed to compete and collaborate effectively in today's environment. Further, the group of dedicated facilities professionals/trainers mentioned last year completed an extensive development of a basic supervisory training program. We have now successfully launched the new Supervisor's Toolkit—a five-day program specifically focused on training for front-line supervisors in the trades, custodial, grounds, and general service areas of responsibility. Not only is this training program being offered internationally; it can be delivered at your own institution or at a nearby regional institution. To date, the program has been delivered eight times across the United States and Canada (from St. John's, Newfoundland to San Jose, California). Furthermore, interested individuals and/or trainers on your campus are welcome to take the

five-day course along with a comprehensive facilitator enhancement session and become qualified to deliver the program regularly at your time and place of choice. Finally, visit our new "Online Learning Center" on the website and sign up for one or more

of our electronically delivered short compliance courses. "Webinars" on specific hot topics have been planned for delivery this coming fall.

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Collaboration

Increased collaboration and partnering continues to occur on a number of fronts to increase the depth and breadth of information and ultimately the value you receive as part of your membership. Most notable this past year was the co-location of the annual Forum with NACUBO (National Association of College & University Business Officers) at Opryland in Nashville, Tennessee. The evaluations received from Forum attendees reinforced the value of this initial collaborative effort. The only complaint was why we had not collaborated in the delivery of our annual meetings earlier. So remember, our 2006 annual Forum will consist of a joint meeting with NACUBO and SCUP (Society for College & University Planning) in Honolulu, Hawaii. We plan to deliver a seminal educational event you won't want to miss. This certainly represents the ultimate opportunity in collaboration and partnering!

In this resource tight environment, energy smart and environmentally sensitive tools and technical assistance remain invaluable to meet your ever changing, increasingly demanding energy and utilities requirements. These tools are available as a result of our strategic alliance with the Department of Energy/Rebuild America program (DOE/RBA) and the strong relationship we have formed with Environmental Protection Agency's (EPA) Energy Star program. Consider becoming a Rebuild America partner at your institution or in your community today.

In addition, this year we are introducing two new association relationships, thereby expanding the collaborative opportunities available to you. First is the American Society of Healthcare Engineers (ASHE) who will assist APPA in its effort to focus more comprehensively on a code

advocacy program, and APPA will correspondingly assist ASHE with its effort to focus on the delivery of supervisory, managerial, and leadership educational programming. Secondly, the International Sanitary Supply Association (ISSA) will collaborate with APPA on developing a substantive research project for benchmarking data in the custodial arena.

These strategic alliances and partnerships help APPA leverage its resources to provide cost-effective, focused research, information, and educational programming, and at the same time ensure an increased information flow to its members.

Credibility

Environmental issues and concerns remain an important part of our alliance with American Council of Education (ACE), NACUBO, Council of Safety, Health, and Environmental Managers Association (CSHEMA), a division of the National Safety Council, Howard Hughes Medical Institute (HHMI), and Campus Consortium for Environmental Excellence (C2E2), and drive our effort to create and maintain a substantive dialogue with the EPA. Significant progress is being made regarding regulatory change in hazardous materials/waste compliance. In fact, an article appeared in *The Chronicle* this past June outlining our progress and EPA's response to this important piece of regulation. We are pleased with the dialogue and relationships that are forming with the EPA and its Office of Solid Waste around this important issue. In addition, EPA's College & University Sector Initiative and the recently established "compliance assistance center" are both notable and noteworthy in our quest for a meaningful and substantive dialogue with EPA. Visit our website for updates on progress and a link to this EPA initiative and the associated compliance assistance center.

I cannot emphasize enough the importance of APPA's primary role "to increase the awareness of the facilities profession with senior institutional officers." Having Dr. William E. (Brit) Kirwan, chancellor of the University of Maryland System and the elected chair of both ACE and NASULGC along with Dr. David Ward, president of ACE (and former Chancellor of the University of Wisconsin, Madison) provide the opening keynote for our 2004 Forum is key in helping shape our own thinking about the issues we face and the contributions we can make to their long-term resolution.

I must say that our competitive advantage in this rapidly changing and challenging world is the fact that you continue to choose to remain members of APPA, actively engage in our programs, and faithfully utilize our products and services. I know many of you are facing difficult economic times and the decisions you face and the priorities you make must be strategic. We appreciate the value you continue to place on your membership in APPA and in our training and development programs and publications. We understand that our efforts to focus on the grassroots of this organization must not only continue in the coming year, but increase appreciably to ensure that your needs and expectations are being heard and ultimately met. I firmly believe that it is through the vast array of educational offerings, print and electronic information, and publications that APPA can help you gain that competitive edge and enhance your professional image.

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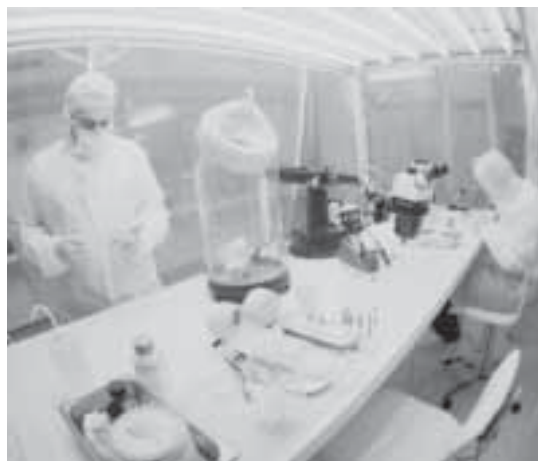
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