

President's Report

by Jack K. Colby

When I took office as APPA's President this past August in Orlando, I related to the banquet attendees that it was an exciting time to be APPA President. Little did I realize just that these last 11 months would be so exciting. Since that night, we have begun a journey for APPA that will set the stage for the success of our association for many years to come.



The Strategic Plan

In Orlando, the Executive Committee determined that in order to address a number of trends, it was time for the APPA leadership to re-examine our current strategic plan and to set a new direction for the association. Over the course of the next months, a survey of over 1000 members was conducted to determine the perceptions of APPA and the services that it provides to our membership.

This information, along with the input from APPA committees, business partners, and Board of Directors was utilized by the Executive Committee to evaluate our current position and then develop 7 Key Strategies that will prepare APPA to not only improve its services to current members, but to create the "Association of Choice" for young professionals who will be the future leaders of APPA.

Our primary goals will be to re-engage the Senior Facilities Officer at our member institutions, provide an enhanced website to be the "go-to" information source for our members, to expand collaborative relationships and research efforts, to develop a clear

"brand" for APPA, to provide cutting-edge educational programs, and to engage young professionals through professional certification. We are actively implementing the new strategies and will keep all the membership apprised of our progress.

Regional Meetings

It was a great pleasure to have the opportunity to visit four of our six regions this past fall at their annual meetings. At RMA in Vail, Brenda and I sampled true western hospitality in a beautiful setting with some German food and mountain horn playing thrown in for good measure. Many thanks to Mark Shively and Tommy Moss for their great leadership. Next came CAPPa in Little Rock where we sampled the local catfish and enjoyed the scenery of central Arkansas. It was great to see many old friends and to meet with the CAPPa Board under the leadership of Presidents Darrel Meyer and Dave Millay.

The beautiful Pacific Northwest was our next stop as PCAPPa came to Tacoma. Many thanks to Towny Angell and Scott Burns for their wonderful hospitality and a great night on the water of Puget Sound. St. Paul was the site of this year's MAPPA meeting where we enjoyed dinner with the dinosaurs and a comedy skit with Becky Hines and Jerry Carlson.

My lasting impression of all these wonderful meetings was the dedication and enthusiasm of our membership and the tremendous programs that we are delivering to prepare the facility managers of the future. "Atta job!" to all of APPA's regions and their Boards for a job well done.

Reforming the Annual Meeting

One of the 7 Key Strategies was to completely reform our annual meeting to focus on the interests of the senior facilities officer. I appointed a task force of very talented and dedicated APPA members to provide the ideas and wisdom to create a new and exciting opportunity for all educational facilities managers. The task force reported to the Board in February and with further guidance, moved ahead to develop a new format and content to be delivered in Baltimore next year. Our new name for this event will be **APPA 2007** with a theme of "Back to the Future" to portray our commitment to provide cutting edge educational programs. You won't want to miss this new program designed for the senior facilities officer. See you in Baltimore in 2007!

Certification and Credentialing

The Certification and Credentialing Task Force was created to take an in-depth look at the need for credentialing of our membership and the best means of delivering this member service. Our survey of members and Institute grads said that now was the time to develop the program and make it available to our young professionals. The task force did extensive work to benchmark against other models and to derive all the best practices for our program. The Board gave its approval to the task force recommendations in February and we are moving ahead to deliver the first of a two-step credential in 2007. Full professional certification will be targeted for late 2008. Look for this great opportunity to improve your professional skill and standing.

Continued on page 8

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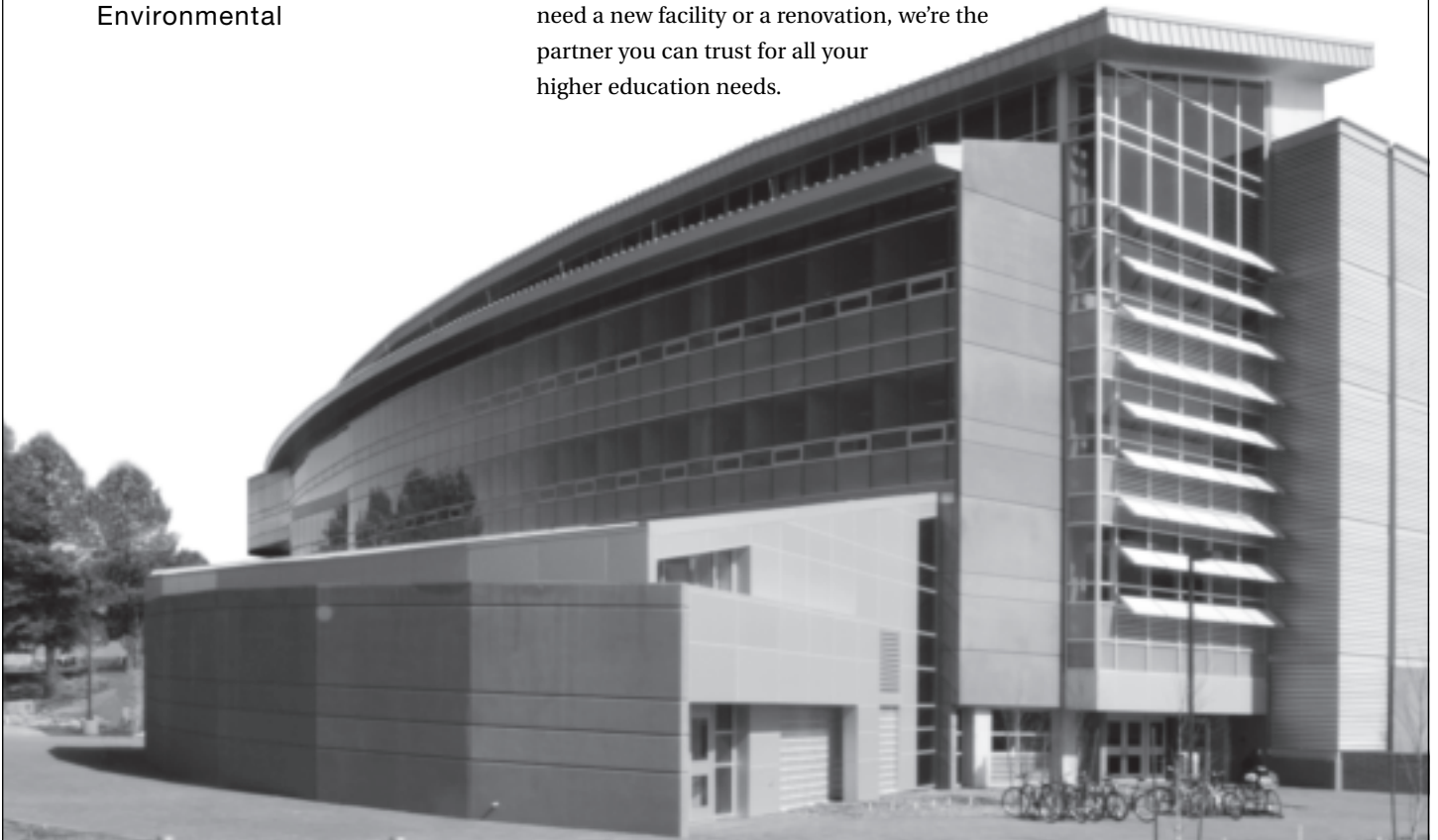
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Continued from page 6

"Thought Leaders" Series

To identify the top issues that will drive the world of higher education facilities, APPA, in partnership with Carter & Burgess, hosted a workshop of top leaders in higher education. The drivers of higher education will indeed impact how facilities can benefit the success of the institution and the fulfillment of its mission. This ongoing series will provide facilities managers with important issues that will prepare them to contribute to the top-level decisions affecting their institutions. Look for the document in September.

AUDE Strategic Partnership

In March I had the opportunity to represent APPA at the AUDE annual meeting in Glasgow, Scotland. Graham Bell at the University of Glasgow was our host and did a wonderful job to make all of the delegates welcome in their wonderful city. The program was excellent and certainly highlighted the many challenges that our sister institutions face in the U.K. Our relationship with AUDE is strong, and we will be working to share many of our mutual programs in the future. Many thanks to Graham and his staff as well as Suzanne Irwin at AUDE for their gracious hospitality.

When not working on the programs described above, I have had the opportunity to share APPA's programs with delegates to the Council of Higher Education Management Associations meeting and to visit one of our leading state chapters GAPPa for their annual gathering at Jekyll Island. I visited the CAPPa Technology Conference and the Leadership Academy as well. It has truly been an honor to represent all the APPA membership as I have visited with these groups to tell them about all the exciting new directions that our association is taking.

As my term nears its end, it is appropriate to recognize all the wonderful people that make serving our association such a memorable experience. The APPA staff are such wonderfully creative, supportive, and industrious people. We are so fortunate to have such great ambassadors for our association. Likewise, I was very blessed to have the opportunity to work with a great Executive Committee and a very impressive Board of Directors. There are no harder working people than these volunteers, who give of their time and effort to serve all of you as our association members. I am proud to call them friends and colleagues.

I must also extend my utmost gratitude to Kevin MacNaughton and Charles Leffler at NC State University. Without their constant support and encouragement, as well as the support of my own staff in Facilities Operations, my service to APPA would not have been possible. My final thanks go to Lander Medlin, our APPA Executive Vice President, who has been instrumental in making all of the wonderful new directions happen. Her energy, professionalism, friendship, and dedication to APPA are truly priceless. *"Make It So Number 1!"*

I can honestly tell you that it was, is, and will be an exciting time to be APPA President!

Immediate Past President's Report

Edward D. Rice

Recently I gave a presentation on APPA at the Big 12 Facilities Conference in Lincoln, Nebraska. The short presentation emphasized what APPA is, where APPA is going, and, more importantly, what APPA means to educational facilities professionals. Afterwards, a friend who is also an APPA member and a chapter president told me he under-

stood what I was saying and was going to work to get their chapter members more involved in APPA. I appreciated that, but on reflecting what

was said I felt it is a shame that more educational facilities professionals don't understand the importance of APPA to their career.

Somehow we (APPA) are not getting the message of importance of APPA to one's career out to those educational facilities professionals in the chapters and regions who are not APPA members or are not participating. By not participating they specifically don't vote and they don't attend the annual conference. By the way, of the APPA six regions two have bylaws requiring their members to also be APPA members. Perhaps the other four may wish to rethink their approach to this.

I have worked hard to tell all educational facilities professionals over the past three years to spread the APPA message. It's a message that needs to be constantly put in front of people. To get the message out on a continual basis there are many current and former Board members of chapters, regions, and international APPA who could speak the message at every opportunity. This could be done at informal or formal meetings, large and small meetings, or just during a one-on-one session. There is also an untapped resource of emeritus members who may be interested in putting the message out at every opportunity.

During the past three years I have had a wonderful and exciting time representing the APPA membership because that is what APPA is an association of members that support each other. My wife Janet and I have logged a lot of air miles and road miles travel-



ing to many places. I have also logged many hours of seat time at Board meetings and other programs as APPA's representative, listening to the membership discuss their particular issues and seeing many receive recognition for their volunteer efforts. I hope I have been able to provide help and assistance to the membership. Now it is time for me to get out of the way for fresh blood to take up this challenging and rewarding work. It has been an honor and a privilege.

I would like to thank everyone who made it possible and supported me. First my staff at K-State (Linda, Vickie, Dave, Ed H., John); my boss, Dr. Tom Rawson (he made it possible); our friends in CAPPA and all the regions; the members in New Zealand and Australia; the good folks at AUDE; the APPA staff (they are a great bunch); the APPA Board; and my beautiful bride Janet and our children and their families. A good friend asked me, "What is your greatest memory?" Professionally, it's the memory of meeting the many facilities people who treated us with kindness and hospitality, and most importantly is the memory of sharing this adventure with Janet.

And, to all who read this report, I thank you.

President-Elect's Report

Christopher K. Ahoy

As your 2005 APPA

President-Elect, I had the opportunity to meet friends, international guests, and

members of APPA in Mexico, Singapore, Australia, and New Zealand. The following is a brief report on my activities and comments.



At the XII IDEPAF Conference, San Luís Potosí, México on Saturday, June 11, 2005, I was pleased and honored to present to the ITESM Physical Plant Administrators an "Overview of APPA and Leadership in Facilities Administration." There were 25 Tec Monterrey campuses listed at the conference out of the 30 Tecnológico Monterrey campuses. These campuses comprised the following: Augacliantes, Ciudad de Mexico, Cd. De México, Chiapas, Ciudad Juárez, Estado de México, Guadalajara, Hidalgo, Higo, Iraputa, Mazatlán, Liana, México DF, Monterrey, Morelia, Puebla, Querétaro, Saltillo, San Luís Potosí, Santa Fe, Sinaloa, Silipi, Sonora Norte, Veracruz, Tampico, and Zacatecas. There were 110 campus attendees and approximately 20 to 30 vendors.

I was armed with good wishes and greetings for our friends south of the border from the following: Lander Medlin, APPA's executive vice president; Townsend Angell, current president of PCAPPA; and Johnny Torrez and Gary Reynolds who represented APPA a year ago at Cordoba, Mexico. Gina Martinez Medina, host and director of Planta Fisica, San Luís Potosí, and the attendees received the following PowerPoint presentation:

1. Brief information on Iowa State University
2. APPA's Vision
3. What is APPA?
4. APPA's Purpose
5. APPA's Value Propositions
6. How Can APPA Help the ITESM Physical Plant Directors?
7. Leadership in Facilities Administration

The Mexican hospitality and friendly enthusiasm is very infectious. The APPA organization has a lot to offer to international colleagues in facilities planning and management. We should capitalize on the Mexican

new-found enthusiasm with APPA contributions in Mexico and work to coalesce their inherent passion with an appropriate APPA response for international connection. We need to assist our colleagues in Mexico achieve institutional and associate membership and help them create a robust structure so that they may partake in what APPA has to offer in education programs, research and information, and recognition.

Our APPA outreach program will help to recruit the Tec Monterrey Director of Planta Fisica and the Director de Administrativo y de Services (both positions appear to play key roles in the facilities arena on Mexican campuses) as international institutional and associate members.

Since the ATEM conference was located in Perth, Western Australia last year, my wife Ruth and I had a unique opportunity to travel in the easterly direction to Perth. On September 26, 2005, we left for Perth, via Zurich and Singapore to attend the Tertiary Education Facilities Management Association (TEFMA) conference in concert with Association Tertiary Educational Management (ATEM). I made several contacts in Zurich and Singapore and visited Australian and New Zealand universities which had APPA members setting up speaking engagements to showcase APPA and Iowa State University. Generally, at most stops I spoke briefly about ISU and informed folks regarding APPA's value propositions and the benefits of membership. Process improvement and continuous quality improvement are topics that I am passionate about they seem to resonate with our international friends. I presented information to those who are seeking world-class stature. I was able to share the "what" the "why" and the "how" through connecting the Baldrige seven criteria of management system with metrics using the

Balanced Scorecard Plus six criteria and LeanSigma Way of process improvement to achieve world-class stature.

On September 23, 2005, the trip to Singapore was most memorable. The National University of Singapore (NUS) hosted the venue and invited

guests from industries and higher education institutions in Singapore. NUS's standing is in the top quartile of the world's 100 best universities, as noted in this year's *Times Higher Education Supplement World University Rankings*. It is a global-oriented university with a hospital and an academic campus,

building synergy between research and entrepreneurship towards a global knowledge enterprise. The Knowledge Sharing Seminar scheduled for me was "Best Practices in Facilities Management." Michael Ng, NUS OED Director and his management Support officer, Jasmin Tay, were instrumental in arranging the venue and in inviting approximately 140 attendees. The session was certainly efficient and productive. As a success story, David is working with all those who attended the seminar by continuing discussions on process improvement tools and for them to become APPA chapter members in Singapore as well as international institutional and affiliate members.

On Tuesday September 26, 2005, I was invited to attend the TEFMA board meeting, along with one other international guest, Simon Britton, director of estates, University of Leicester from AUDE. I presented a brief overview of APPA and some information on ISU followed by what's new in my business. Alan Egan, president of TEFMA had asked that I specifically focus on this. During the presentation I mentioned the possibility of a joint task force on strategic alliance in developing and furthering more work on core data that would cross function internationally with respect to usage. I suggested that other than leadership visiting each other at their respective conferences that we consider having a work group from two organizations meets at the annual executive or task force work sessions. Since Alan Egan is leaving the leadership and Robert Kelly is the incoming president, this task will have to fall on Robert Kelly and me to launch this initiative.

The hospitality extended to me by the representatives of the Australian facilities management operations at the various visits to higher education campuses was most gracious and

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friendly. I visited and spoke at Crawley campus of the Western University of Australia (UWA) in Perth. In Adelaide, I visited the Mawson Centre Lake campus and downtown City Campus and University of South Australia close to University of Adelaide. In Melbourne, the La Trobe University Bundoora Campus, Bendigo Campus, Bendigo Campus, Beechworth Campus and Albury Wodonga Campus, then on to RMIT one of Australia's leading educational institutions with a commitment to applied education, training, and research in the center of the city.

In Sydney, we drove to several university of Western Sydney (UWS) campuses located in Greater Western Sydney. The University of Western Sydney has several campuses (Bankstown, Blacktown, Campbelltown, Hawkesbury, Paramatta, Perinth, and Sydney CBD Precinct). I visited The Parematta, Blacktown Campus and the main Campus at Perinth. Following this the next day I saw the University of New South Wales (UNSW) campus. University of New South Wales is one of Australia's leading research and teaching universities. That afternoon I hopped over to the University of Sydney, founded in 1850, which is Australia's first university. Over the past 150 years, the university has built an international reputation as a centre of research excellence and for its outstanding teaching.

Our next stop before heading home was Auckland, New Zealand. October 11-12, 2005, Roy Dicker, director of the Manukau Institute of Technology (MIT), his administrative assistant, Grace, and some of the facilities employees gave us a big Maori welcome with a Powhiri ceremony. The Maori welcome ceremony took place in the Maori sanctuary, built on campus to teach Maori tradition and legacies to the descendants of those early occu-

pants of the New Zealand islands. Recitations of traditional Maori and songs sung in the Maori language filled the hallowed occasion led by two elder "Khutamaous" who gave prayers, blessings, explained the meaning of various carvings, parted words of wisdom ("it takes a team to weave a basket") and bade us safe journey in our trip in NZ. Ruth and I will forever remember the warm friendship in NZ and the warm Maori welcome for the rest of our lives. Thanks to Roy and his staff for their wonderful effort and friendship towards APPA.

The University of Auckland was my next stop, which is New Zealand's pre-eminent research-led university. Established in 1883, it has grown into an international center of learning and academic excellence. We drove down the north island toward Wellington and stopped at Palmerston to visit Joe Hollander, who was instrumental in guiding me with Pam Esdaille in generating the trip schedule and calendar to Australia and New Zealand. Massey University is one of New Zealand's leading educational institutions. A state-funded university with a proud 70-year tradition of academic excellence and a strong national and international reputation, Massey University is an important part of New Zealand's post high school state education system. We drove to Wellington and visited Victoria University and Massey University located in the heart of the city and well established. Wellington reminded me of a mini San Francisco, California city.

From Wellington we flew to Christchurch the last stopping point before going on an Antarctica expedition. The University of Canterbury is located in Christchurch, the largest city in New Zealand's South Island. Our last university stop was in Dunedin in the south island. The University of Otago, founded in 1869 by

an ordinance of the Otago Provincial Council, is New Zealand's oldest university. The new university was given 100,000 acres of pastoral land as an endowment and authorized to grant degrees in Arts, Medicine, Law, and Music.

The journey as APPA's President-Elect is coming to an end for me, I appreciate the opportunity to represent our membership around the nation and the world to carry the APPA vision of "Becoming Your Global Partner in Learning." Our President, Jack Colby, has an ambitious agenda already in the works with the seven strategies. I look forward to all your continuing support and assistance in making APPA the association of choice. I will continue on the good work already begun for the coming 2006-07 year.

The Seven Key Strategies continue for 2006-07:

1. Branding (marketing APPA to new members and others)
2. Enhanced Website (knowledge capture and transfer)
3. Expanded Research (global thinking with local solutions)
4. Collaborative Relationships (global thinking with local solutions)
5. Engage Young Professionals (recruitment and retention goals)
6. Cutting-Edge Education Programs (provide target programs, knowledge capture, and transfer)
7. Certification and Credentialing (create the future)

It will be my distinct honor and privilege to lead the APPA organization to continue the work already begun in July 2006.

Secretary-Treasurer's Report

Robert J. Carter



The past year has been pivotal for APPA.

The Board has embarked on a plan referred to as the 7 Key Strategies, to position APPA as the association of choice for educational facilities professionals. In order to provide the resources to implement the necessary actions, APPA will have to depart somewhat from its usual budget strategy. In the fiscal year ended March 31, 2006 we have, through diligent expense control and maximization of revenues by APPA staff, finished the year with a surplus even though there were some significant extraordinary expenses.

In the membership area, through the efforts of the Membership Committee and the membership and outreach staff we have developed several additional grass roots recruitment and retention tools that will assist APPA, regions and chapters in their recruitment efforts, including guidelines for targeting and inviting potential members to regional and chapter functions and holding first-timer/new member orientation sessions at these functions. In addition, the committee has outlined its vision for a high quality video and/or slide presentation that will clearly and professionally outline APPA's brand and the value to our members.

Financial

We ended the 05/06 fiscal year with a surplus of \$75,925, which was marginally less than the targeted surplus in the 05/06 budget of \$101,320. Of the surplus, \$25,000 was contributed to the reserves for capital and operating expenses with the remainder being held in current operating funds.

These reserves now stand at \$923,000 (excluding the equity gains in long term investments) or 74 percent of the \$1,100,000 goal that represents 25 percent of the operating budget and 5 percent of the estimated replacement value of our physical assets. The APPA headquarter building was assessed for approximately \$2 million in February 2006 by the city of Alexandria, and the building is fully paid.

Graph 1 on page 13 shows the six-year history of revenues and expenses for APPA. The revenues for the year by category are shown on the second graph on page 13. Graph 3 on page 14 indicates how APPA expends funds to achieve our mission of supporting educational excellence with quality leadership and professional management through education, research, and recognition.

The single largest extraordinary expense was related to the discontinuance of our relationship with our IT service provider. This necessitated writing off the cost of the development of the content management system for our website and the internal integration of our association's databases and applications, which was previously capitalized (\$140,000). Given the importance of an enhanced website and integrated databases and applications a new service provider was deemed necessary, and we are confident that our new provider will perform up to expectations. The good news is that we were able to generate substantial revenues in publication sales, magazine and job advertising, and membership to help offset this one-time expense and still achieve a surplus balance.

There is continued good news with respect to APPA's equity investments. They ended the year with a positive overall return as a result of strong market conditions. The investment objective for this portion of the reserve is long-term capital appreciation and

fluctuations in the magnitude of returns from year to year will occur.

I want to stress to the APPA membership that an excellent job was done again this year by the APPA staff in controlling expenses and managing the entire budget. On behalf of the membership I would like to offer my sincere appreciation.

Membership

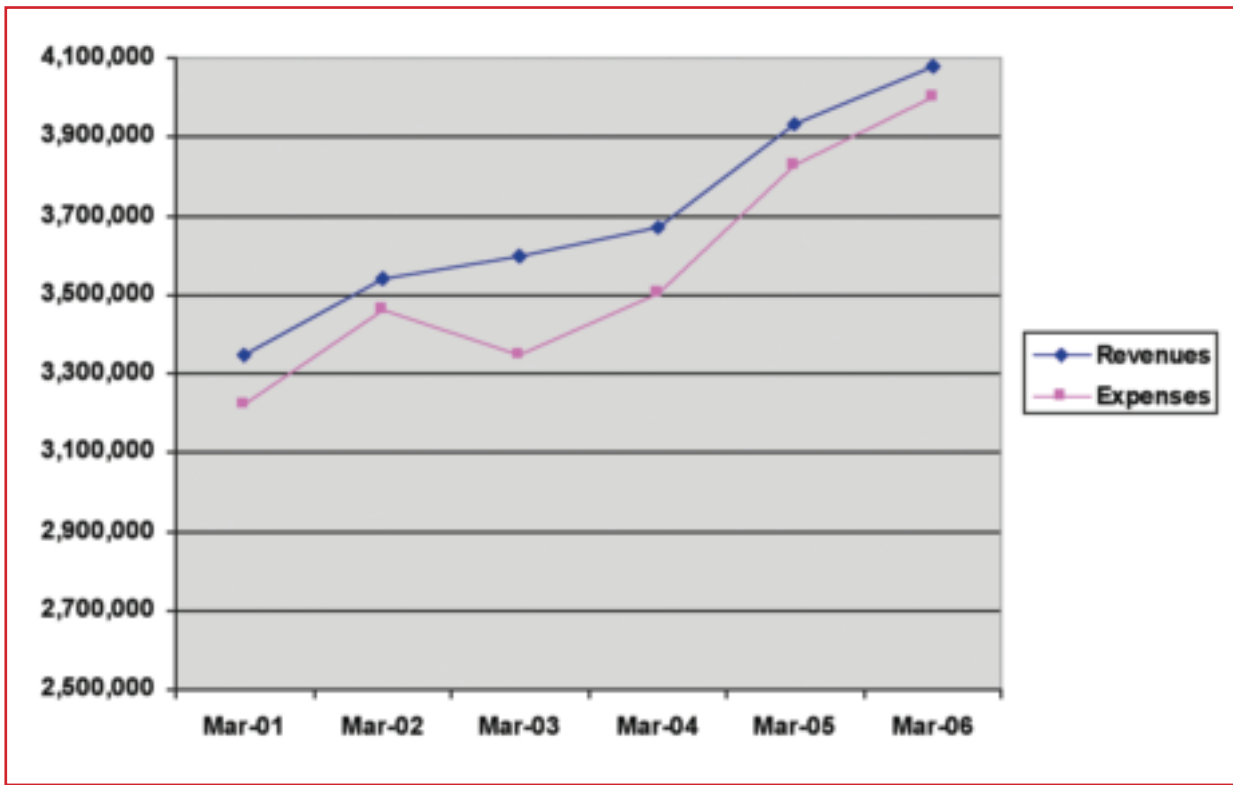
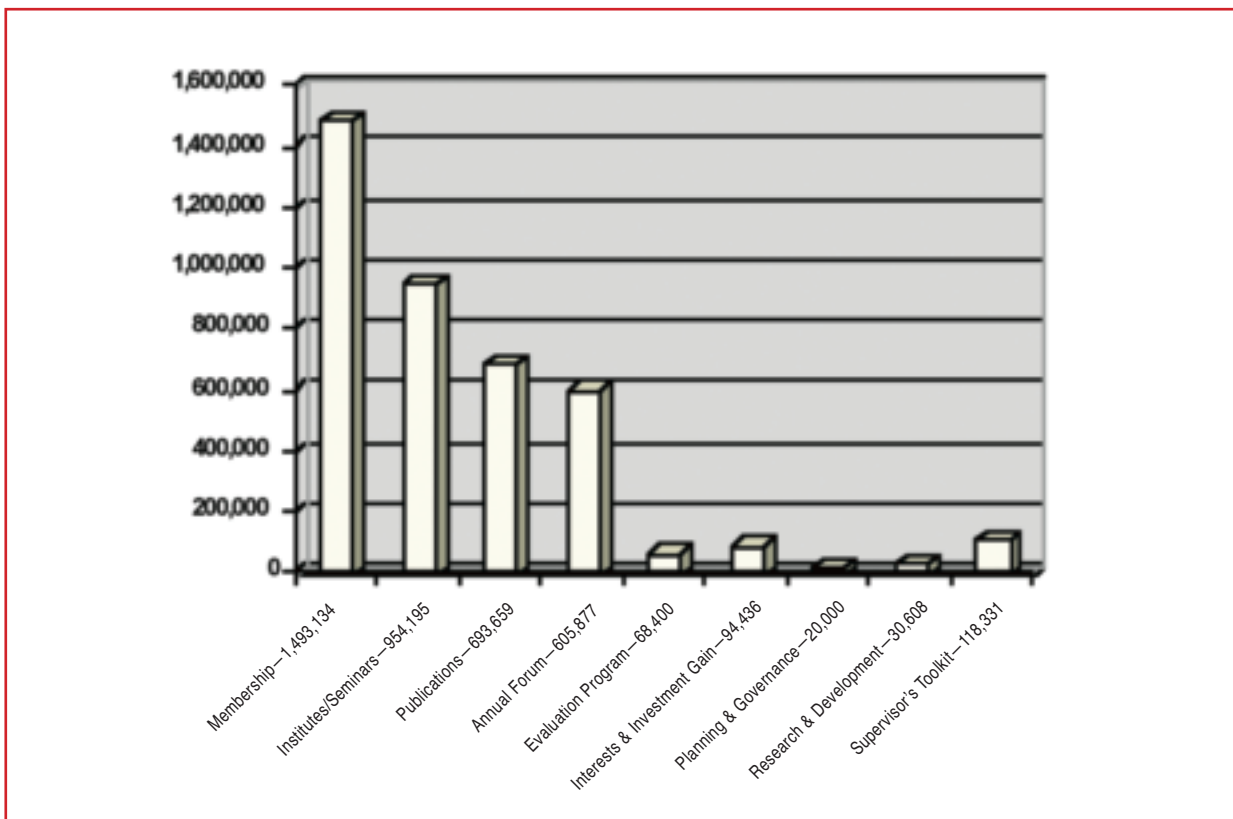
Some of the notable activities over the past year include the following:

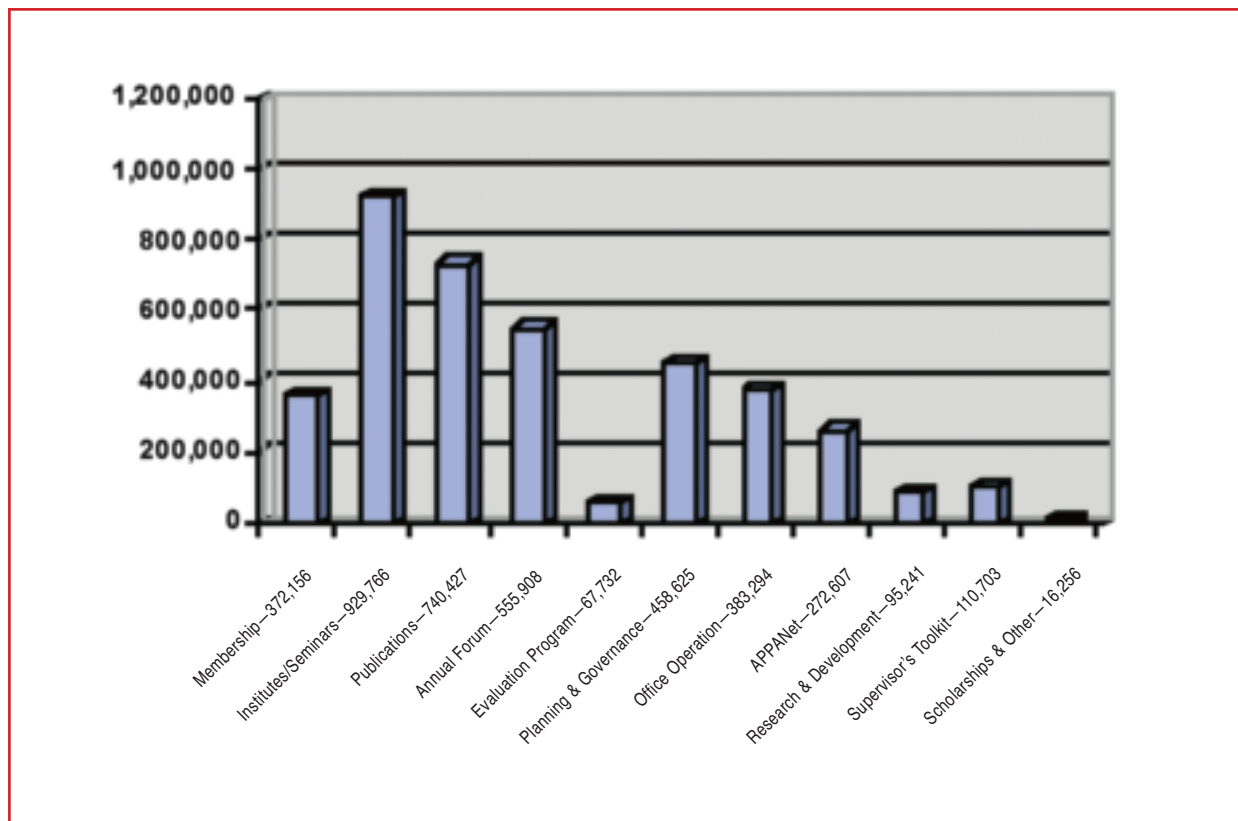
Recruitment and Retention

The Membership Committee developed a tactical plan that included a process for inviting potential members to regional/chapter/international meetings. The invitations could be based on strategic recruitment goals, such as diversity, engaging younger professionals, targeting specific institutions, or any other strategic objectives that regions or chapters may feel are important. In addition, a proposed structure for a first timer/new member orientation session at these meetings was developed that would include several key messages regarding the benefits of APPA membership, testimonials, and a general welcoming atmosphere.

Diversity

The Membership Committee identified the importance of highlighting and encouraging diversity within all levels of APPA. A document outlining opportunities where diversity could be considered was developed and forwarded to regions asking that it be distributed annually to their respective boards and chapter presidents and included in their Board orientation and any handbooks or training manuals. The committee felt that implementing the suggestions in this document should help us to be a more inclusive and vibrant organization.

GRAPH 1. APPA'S HISTORY OF REVENUES AND EXPENSES**GRAPH 2. 2005-06 SOURCES OF FUNDS (REVENUES)—\$4,078,640**

GRAPH 3. 2005-06 USES OF FUNDS (EXPENSES)—\$4,002,715

Engaging Young Professionals

This is one of the 7 Key Strategies and is extremely important for the long-term health of our organization. Arrangements are being made for representatives to attend student chapter meetings to reinforce the APPA message and a marketing brochure was developed specifically with this group in mind that outlines the benefits of APPA membership. Other strategies under consideration are encouraging regions and chapters to invite young professionals to their meetings and possibly develop a mentoring program for them. It should be noted that the Credentialing Strategy is a key action in terms of attracting young professionals to our organization.

Looking Forward

Our future ability to provide leading edge service to our members is

dependent, to a large degree, on having a solid institutional membership base. Throughout this current year, we will be developing a program to encourage the regions, chapters and individuals within them to embrace the grassroots concept for recruitment, retention, and diversity using the tools that have been mentioned above and continue to identify opportunities to deliver the APPA message. As well, the Membership Committee will assist in the redesign of APPA's website and in the development of the credentialing program by providing advice regarding meeting both the present and future needs of our members.

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

Vice President for Educational Programs

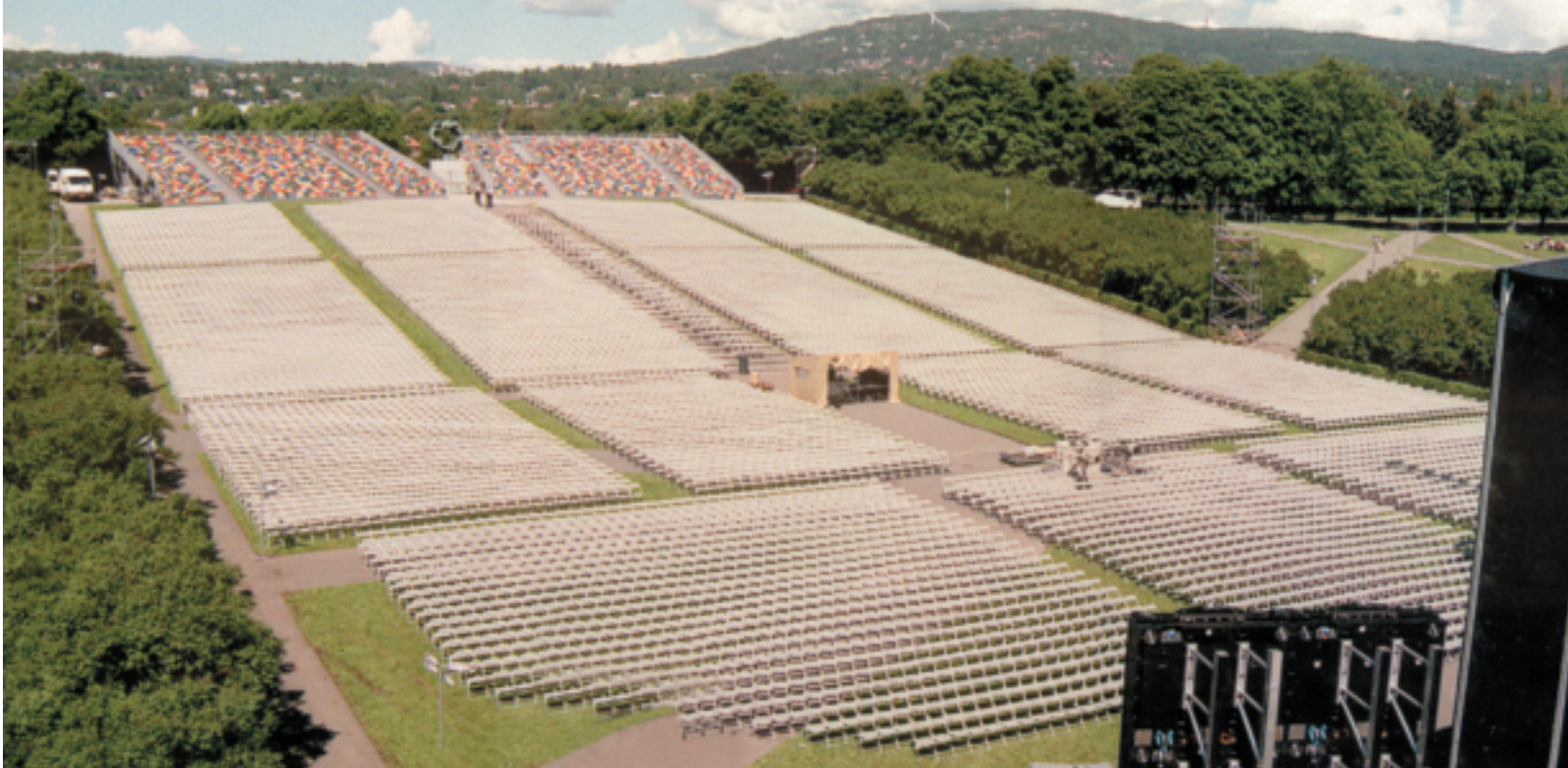
Sam L. Polk Sr.

As I submit this report I am coming to a close of my term as Vice President for Educational Programs. In my two years as vice president we have seen great movement toward change and tremendous hard work by our volunteers of the association to strive to offer outstanding professional development to our membership. I am truly grateful to have been a part



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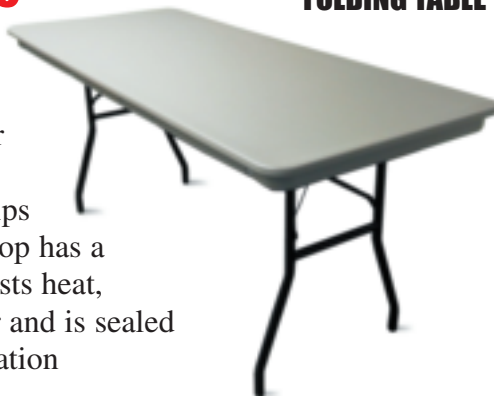
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Continued from page 14

of this outstanding process along with my committee members.

2006 Campus of the Future

The Campus of the Future event is just on our heels and the excitement continues to grow. I am most pleased to announce that APPA is well represented not only in joint programmatic offerings, but within the Expo Hall and among the general attendees. APPA is represented by 18 percent of the total current register attendees, which at last check meant 515 of our members and colleagues will be with us this July. When we began this process many moons ago we were not certain that we would be this well represented among our colleagues of NACUBO & SCUP. On behalf of the Educational Programs Committee, I

thank those who work very hard to encourage and support your regional colleagues to attend. Additionally, the marketing efforts both from an international level as well as regional level have benefited us greatly.

We will be offering an outstanding program that has been created with all educational facilities professionals in mind. The theme of meeting of the minds is being represented from the general speakers throughout the concurrent session offerings as well as those business partners who are supporting us in the Expo Hall. A historical event by far and which none of us will soon forget.

Facilities Management Institute

As APPA's premier educational offering, the Institute continues to provide a solid professional development tool

to the membership. Our most recent program was held in Ft. Worth, Texas in January was marked by solid attendance and a graduating class of 57.

As we prepare to open registration this June for the September offering in California, I would like to thank Jay Klingel, Mary Vosevich, Cheryl Gomez, and Don Guckert as they continue to provide the material that provides the APPA membership with the professional development tools they need. Additionally, they are responsible for continued highest caliber of faculty. For this I am personally grateful.

Supervisor's Toolkit: Nuts and Bolts of Facilities Supervision

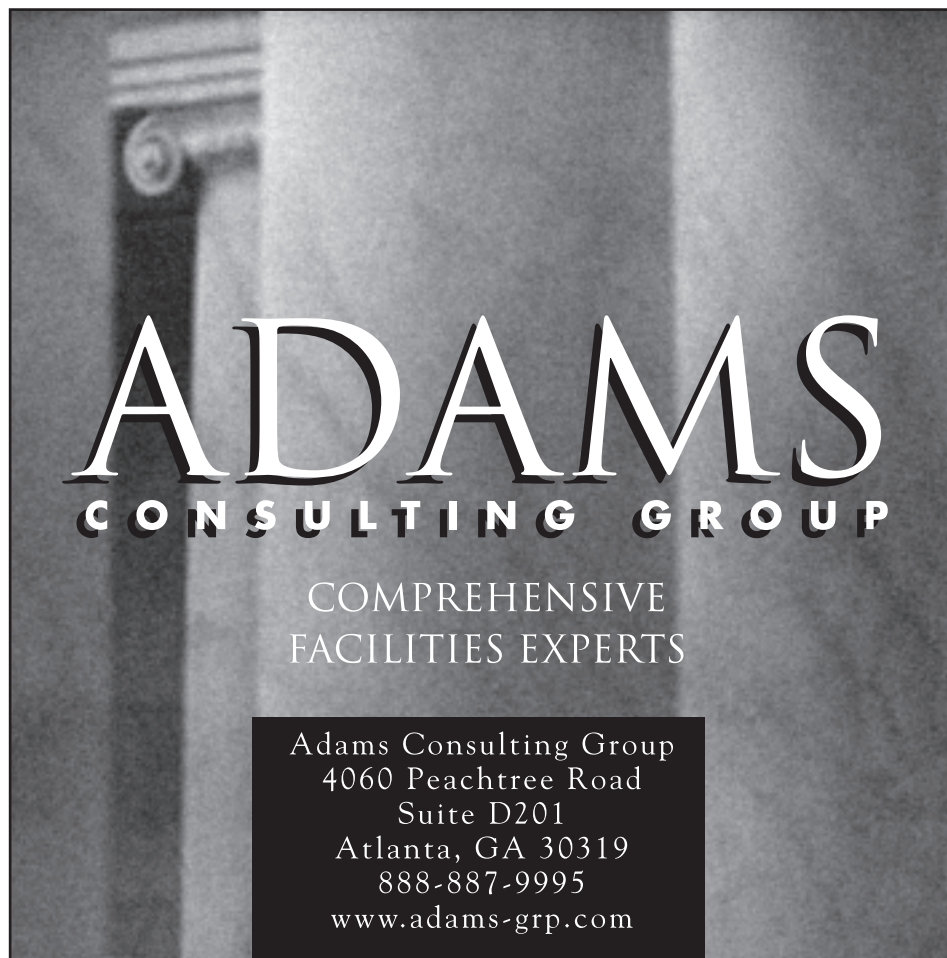
Many thanks to those regions who have truly taken this program and run with it. As I am updated by the staff I am so pleased to hear of the many schools and regions taking advantage of this outstanding program.

I would also like to thank the group of dedicated individuals who never cease to amaze me on how they are constantly checking and rechecking the material of the program to make sure it is all it needs to be. To Wally Glasscock, Nancy Yeroshevsky, Carole Trexler, and Michelle Estep-Frederick, thank you for bringing a much needed offering to our front-line supervisors within APPA.

Leadership Academy

Moving forward with the ever-evolving cycle of professional development offerings, our Leadership Academy continues to tap into those individuals who are climbing the career ladder within facilities.

I would like to once again thank the members of the Academy development group, Doug Christensen, Bill Daigneau, Ann Jenkins, James Cole, David Judge, Gary Reynolds, and Jack Hug.



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Future of Professional Development at APPA

For APPA, 2005 will be best known as the year of self renewal from a programming stance. Many of us have spent much work within subcommittees to really determine the next step needs for the APPA members. We are on the horizon of great change and exciting new offerings from the annual event now to be known as **APPA 2007—Back to the Future**, an offering geared toward the senior facilities professional to be known as the Senior Facilities Officer (SFO) Summit, and just around the corner is certification and credentialing. I encourage all to continue to come to your association of choice, APPA, for the best in facilities professional development.

Closing

The past two years have been among the most rewarding of my career in APPA and higher education. When we took the range, we were buoyed at the start by your expression of support and trust. Your enthusiastic commitment to APPA has continually stimulated me to extend my expectations of ourselves and of APPA.

As we prepare to relinquish our role as of July 2006, we are doing everything to complete unfinished business and assure the smoothest possible entry for the next Vice President, Polly Pinney. I have no doubt that she will do an exceptional job.

Please accept my deepest appreciation for your trusting me and sharing our aspirations for APPA's remarkable educational programs. My life will forever be enriched because of the opportunities to work with the Educational Programs Committee and the APPA membership on shared goals.

Vice President for Information and Research

Michael J. Sofield

2005-06 has been another very busy year for the Information and Research Committee. From last August's annual meeting through the end of December, the committee worked off line and collectively via monthly conference calls to finish refining and testing the Facilities Core Data Survey (FCDS). This year's data collection opened in November '05 and closed in mid-February '06. The survey instrument was refined in response to the many com-



ments received in the first survey, completed last year. Planning is underway to open the 3rd cycle in the late summer of '06 and produce the FPI reports by early spring '07. That will become the normal cycle and will allow for data entry in the late summer after fiscal reports have been completed on campus, and the resultant FPI reports would then be available during budget development time in the early spring. Work is underway to prepare for a workshop presentation scheduled during the 2006 Campus of the Future meeting in Hawai'i.

The 2006 Facilities Performance Indicators report will be available for the COTF meeting and an executive summary will be published and distributed to all members. Some 210 member institutions completed some

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or all of this year's survey with a significant increase in participation from colleges and universities which offset a drop in the response from our K-12 members. This year we will launch a new Web-based report version of the FPI that will be produced in lieu of the former book and CD publications. Finally, the continuous process

improvement process is underway under the watchful eye of APPA's Past President and At-Large Member of the committee, Maggie Kinnaman. This group is mining the data, and responses to this year's survey remains, in effect, our customer survey instrument. The results of all this work will allow APPA to improve the

survey instrument, add and delete questions as needed, and continue to make this a relevant part of your business plans.

Watch for the annual survey to open late this summer. And, if you completed the current survey, your data will pre-populate the screens and you need only update those areas that changed during the year. What a benefit to not have to start from scratch each year.

The newest development from Information and Research is a work in progress to create a graphic "dashboard" that displays key indices from the FPI report. This will allow members to customize the display of data by plotting a goal value to display along with their relative position on each "dial." Watch for preview opportunities during the Campus of the Future meeting.

Publications

APPA continues to pursue an aggressive publications agenda. *Facilities Manager* magazine, published six times per year, remains a leader in our industry and has attracted a vibrant advertising base along with a wide variety of feature articles.

The I/R Committee reviewed and rated the eight eligible articles to determine this year's Rex Dillow Award winner. The award will be presented to Roger Rowe at the Annual Awards Reception in Hawai'i.

The magazine is supplemented with a monthly electronic newsletter—*Inside APPA*. This e-newsletter contains breaking news and information to keep the membership current on changes in our profession as well as providing a regular channel for news and other information.

Publications released during the past year include:

- *Creating a Service Culture: Making the Customer Connection*, January 2005

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- *Facilities Performance Indicators*, Book and CD, August 2005
- *The Business Case for Renewable Energy: A Guide for Colleges and Universities*, Andrea Putman & Michael Phillips, co-publication of NACUBO, APPA, and SCUP, May 2006
- *Stewardship & Accountability in Campus Planning, Design, & Construction*, ed. Don Guckert

Publications currently in development for future release include:

- *Buildings... The Gifts That Keep on Taking: A Framework for Integrated Decision-Making*, Major APPA-sponsored CFaR project by Doug Christensen, Rod Rose, & Terry Ruprecht. Final draft in review; publication planned for fall 2006; audience is top-level administrators and trustees. To be followed up in 2007 by detailed workbook for facilities professionals.
- *The Impact of Facilities on Retention and Recruitment of Students*, CFaR project by David Cain and Gary Reynolds; executive summary has appeared in March/April and May/June issues of *Facilities Manager*. Writing in process on final report; publication planned for fall 2006.
- *Space Planning & Utilization*, Ira Fink, co-publication of APPA and SCUP. Draft manuscript near production; final book published in late 2006.
- *Facilities Reinvestment*, Harvey Kaiser, manuscript in review; possible publication fall 2006.
- *Facilities Management* manual revision (fourth edition), key players to be identified; project will proceed with all four sections being updated in parallel, coordination between Institute dean & faculty with authors and others.
- *Leadership in Educational Facilities*, Chris Ahoy,—possible publication 2007.
- *Shared Services/Outsourcing*, draft in review by APPA; additional writing

and editing to be done; publication planned for 2007.

APPA Website

APPA has completed a switch in service providers. The move was completed in late February and is considered to have been successful. There is a long list of tasks that has been prioritized by APPA staff. Initial focus is on the membership database and billing applications. Heather Lukes from DigitalWise built the original e-commerce and Educational Programs registration systems, so they were not impacted by the switchover. A content management system has been installed that will allow APPA staff to make updates to the website as needed.

Center for Facilities Research (CFaR)

CFaR has made great strides in the past year and is beginning to produce outstanding studies and reference material for your use. At the Campus of the Future meeting, CFaR will formally release two significant original research studies, "Buildings... The Gifts that Keep on Taking" and "Facilities Impact on Student Recruitment and Retention." Both of these studies will be featured presentations during the COTF sessions, and will be subjects for a press conference. They will also be published in APPA's *Facilities Manager* magazine.

This year we'll again recognize the student research projects conducted at Brigham Young University. A student research competition process has been developed within the CFaR framework and will lead to expanded opportunities in the years to come.

Final Notes

Two years ago I was the newly elected Vice President for Information and Research and found a vibrant, hard-working committee that was focused on getting the new Facilities Core Data Survey on the street and

into the members' hands. Congratulations and thanks to this hard-working group. They did it and then did some more! Please take a moment when you see them and add your thanks to mine, for they exemplify the best of APPA. With my sincere thanks and gratitude to: John Jensen, ERAPPA; Randolph Hare, SRAPPA; Fred Plant, MAPPA; Terry Major, CAPPA; Lorenzo Cotton, RMA; Debbie Aguilar, PCAPPA; and Maggie Kinnaman, At-Large; Steve Glazner, APPA's director of knowledge and staff liaison to the Information and Research Committee.

A special note of thanks to Laura Long, LTL Collaborative, for her support in launching and refining both the core data survey and the Facilities Performance Indicators.

Vice President for Professional Affairs

Alan S. Bigger

It seems that the years fly by, and before one knows it, an annual report is due. This will be my third annual report on behalf of Professional Affairs and Awards and Recognition Committees and it has been a humbling experience to serve the membership during the last three years. It has also been a growing and invigorating experience thanks to the wonderful members who represent your regions on these committees and the expertise of the members-at-large. Without their extraordinary help, dedication, and commitment, PAC and A&R would not be able to function. The superb support of the administrative staff at APPA has enabled the committee to function well and to document the



actions of the committee. One of the greatest blessings to PAC has been the addition of Jill Amstutz, director of communications and marketing, who acts as the APPA liaison to PAC and A&R. The committees of APPA exist only for the membership, and we encourage your active feedback to the committees at any time throughout the year. It is your input that will keep the functioning of the committees relevant to the membership.

Awards

One of the most exciting and rewarding charges that PAC and A&R have is to oversee APPA's institutional and individual awards programs. The commitment of the committee members to reading, evaluating, and then meeting to discuss the awards process is highly commendable. The awards for this year are as follows:

Award for Excellence

APPA's highest institutional honor, the Award for Excellence in Facilities Management, provides educational institutions with the opportunity to receive national and international attention for their outstanding achievements in facilities management. There were six submissions for this award; three were selected.

Smithsonian Institution (ERAPPA)

University of Alabama at

Birmingham (SRAPPA)

University of Michigan at Ann Arbor (MAPPA)

Effective and Innovative Practices

APPA's Effective & Innovative Practices Award recognizes programs and processes that enhance service delivery, lower costs, increase productivity,

improve customer service, generate revenue, or otherwise benefit the educational institution. Entries can describe either a new program or significant restructuring of an existing program or process. This award includes a cash prize that is given to no more than five programs each year.

Brown University—Safety Fair

Bryn Mawr College—Innovative and Collaborative Approach to storm water management

Georgia Institute of Technology—Building Services Customer Achievement Program Award

California State University, San Bernardino (PCAPPA)—Comprehensive Energy Services Master Enabling Agreement

University of British Columbia (PCAPPA)—In-Vessel Composting Facility

There were 24 submissions, representing 20 institutions for this award. Awards are underwritten by Sodexho and each institution will receive a cash award of \$4,000. We thank Sodexho for their ongoing commitment to this program.

APPA Fellow

While most awards recognize past achievements, the APPA Fellow designation brings with it both recognition of specific accomplishments to date and expectations for continuing involvement in APPA's leadership program through research and mentoring. This is APPA's highest individual achievement award. There were four submissions for the Fellow designation, and these three selections.

Chris Ahoy, MAPPA

Don Guckert, MAPPA

Gary Reynolds, RMA

Meritorious Service Award

Each year APPA members bestow the Meritorious Service Award upon the individual member or members who



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have made significant contributions to APPA and to the profession of educational facilities management. APPA's highest award for individual service, the Meritorious Service Award is given to no more than three individuals each year. There were nine submissions for this award.

Harvey Chace, RMA

Cheryl Gomez, ERAPPA

Michael Sofield, ERAPPA

Pacesetter Award

First given in 1999, the Pacesetter Award is designed to encourage further participation in APPA among those who have already made significant contributions at their regions or chapters. Up to seven Pacesetter Awards will be given each year. There were eight submissions for this award.

Mark Hunter, PCAPPA

Nancy Hurt, RMA

Fred Long, ERAPPA

John P. Morris, RMA

Arthur E. Sykes, CAPPA

L. Scott Turley, CAPPA

Keith Woodward, ERAPPA

We offer our sincerest congratulations to the institutions and individuals that have won awards this year. Remember to start thinking now about the awards process for 2007. Information about the variety of awards may be viewed at www.appa.org/recognition/. Some tips for submitting applications or nominations for awards:

- Complete each area of the application form
- Ensure that all the criteria for the award are addressed
- Apply for the most appropriate award
- Provide complete documentation
- Submit early
- Use the online application process
- Keep your regional PAC or A&R committee members involved at each step of the process

- The awards program is for APPA institutions and individuals. What a wonderful way for you to recognize people in your organization. Determine NOW to submit an award nomination for 2007.

Other Committee Work

During the year PAC and A&R have continued to address issues that are pertinent to the membership:

- The application process for all awards is now available online and the person submitting the award is provided a confirmation number and the regional representative is also provided confirmation. This has been a huge undertaking and we thank Jill Amstutz and Steve Glazner for their stellar efforts with this process.
- The awards inventory has been reviewed for all APPA awards, and minor modifications have been included to provide committee members the flexibility to make awards in an appropriate and inclusive manner.
- The application process for APPA Fellow has been streamlined so that A&R receives a complete record of all documentation necessary to make appropriate decisions about awards. We thank CFaR and the APPA office for helping with this initiative.
- Communication processes have been developed and documented to ensure that the notification process for awards is timely and appropriate. Flowcharts have been developed for both institution and individual awards. This process enables the APPA office and committee members to communicate award information to persons in an acceptable manner.
- PAC will be reviewing the current criteria for the Facilities Management Evaluation Program to ensure that criteria are consistent with and comparable to the criteria for the Malcolm Baldrige National Quality Award Program. We thank the numerous FMEP evaluators who have provided us feedback for this process.
- Code advocacy continues to thrive thanks to the hard work and advice of Brooks Baker, University of Alabama at Birmingham. Brooks had the vision to implement a program within APPA that will afford APPA members an opportunity to have a say on technical advisory panels and bodies that impact building codes. As of this moment, more than 30 APPA members and business partners have indicated their willingness to be part of the process. We are in the process of recommending placement of code bodies to ASHRAE and later NFPA.
- The "Code Talker" column in *Facilities Manager* has been published for nearly two years now, and we thank all the authors that have been involved in this process. Some authors include Brooks Baker, Chris Ahoy and Dave Ballard, Doug Erickson, Jeff Cooper, Tom Jaeger, Mike Anthony, Ray Gill, John Bowers, John Antonucci, and Dan Wagner. We thank these folks that have been willing to step up to the plate and to be counted.
- APPA continues to reach out to other professional organizations and the synergy of these alliances and strategic partnerships has a meaningful impact on the value of APPA membership. APPA currently has more than ten alliances that enable our organizations to network and cross-fertilize ideas and programs. The EPA's Strategic Partnership, through the Colleges and Universities Sector Workgroups, ACUHO-I, ASHE, and ISSA are just four working examples. APPA has made presentations at ASHE's annual conference and ASHE has presented at APPA's annual conferences and submitted articles to *Facilities Manager*.

- APPA continues to work with the International Sanitary Supply Association in a collaborative manner. APPA has presented two Supervisor's Toolkit workshops in conjunction with ISSA's international conferences in New Orleans and Las Vegas. APPA has an assigned slot on the technical standards committee of ISSA, and ISSA has presented two seminars in conjunction with APPA's annual conferences. In addition, ISSA has offered a matching grant of \$7,500 towards a research project that addresses the impact of cleaning (or lack of cleaning) on student performance. The draft of this project has been filed with CFaR and includes researchers from both APPA and ISSA.

The Future

Thanks to the foresight of President Jack Colby and the support of APPA's Executive Committee and Board of Directors, exciting times lie ahead as PAC, A&R, and all APPA committees strive to meet the seven strategies that have been identified for the next few years. PAC and A&R look forward to working with Jack Colby and President-Elect Chris Ahoy and we move ahead to accomplish the seven strategies. Together we will be creating the future of APPA today, and to provide for and meet the membership needs of tomorrow. We need to **hear from you**—your ideas, hopes and dreams are what should be driving us to create the future today. Please stay in touch with any and all members of the APPA Board. APPA is nothing without **you**, and without **your** input we cannot

implement the grand strategies that lie ahead.

Executive Vice President's Report

E. Lander Medlin

As the perfect storm of ever-increasing enrollments and continuously declining state and federal appropriations continues, it is clear that stormy budgeting weather is here to stay. Significant state and federal support cannot be relied upon to solve the funding



challenges facing higher education especially given the continued escalation of state entitlement program obligations and federal defense spending. However, despite all these challenges, most of the world's citizenry value the work of colleges and universities and their education systems as a whole and correctly understand the economic and social benefits that a good education delivers to its youth. Overall public perception is positive, however, it is their financial support that is desperately needed.

Fortunately, APPA continues to receive strong support through active individual member involvement and participation and from its member institutions and business partners. 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 \$41,000. A large portion of these monies have been placed in our operating reserves fund representing close to 75 percent of our long-term, Board-directed cash reserves goal. We are also pleased to report that most

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categories of our budget achieved or exceeded the budgeted targets set by the Board for revenue generation and expense minimization. As such, APPA remains the "association of choice" serving the educational facilities professional with a myriad of professional development opportunities.

Under the excellent leadership of President Jack Colby, our strategic plan has been revitalized with a focus and direction on the achievement of 7 Key Strategies over the next three to five years. Those 7 Key Strategies are:

- Develop and execute a "branding" program
- Develop and implement a cutting-edge website to provide the "go-to" resource and brand clarity
- Expand research to build credibility and visibility
- Engage in symbiotic and collaborative partnerships
- Engage young professionals in the organization
- Provide targeted cutting-edge educational programs and "fix" the Forum
- Establish credible and valued credentialing programs for individuals and institutions

The desired outcomes of competency, collaboration, and credibility of our members remains a consistent key message and a laudable goal for the association.

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 new 2004-05 *Facilities Performance Indicators* Web-based materials, the trilogy of staffing guidelines for the custodial, trades, and grounds areas, and our newest books *Making the Case for Renewable Energy* (published in collaboration with NACUBO and SCUP) *Stewardship & Accountability* in

Campus Planning, Design, & Construction, you should quickly ensure that it does. In addition, I highly recommend the previous titles of *Planning and Managing the Campus Facilities Portfolio*, the *Building Commissioning Handbook*, second edition, the monograph *Field Notes* by James Christenson, and the customer service

book titled *Creating A Service Culture: Making the Customer Connection*.

Further, the availability and flow of relevant information regularly occurs via APPA's bimonthly magazine, *Facilities Manager*; *Inside APPA*, our biweekly electronic newsletter; our website, www.appa.org; and the

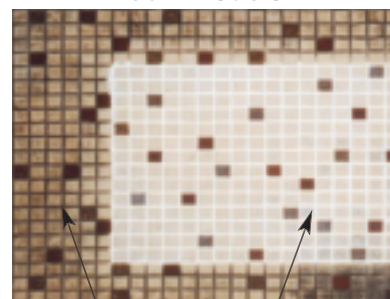


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CFaR, APPA's Center for Facilities Research, is also resident on our website and fills a vital need by integrating the development, collection, and delivery of research in the education environment. Active participation in and involvement through CFaR 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 educational facilities-related information. The research collected and sponsored by CFaR will provide compelling information to a number of

key constituencies and educational stakeholders.

A dozen research projects have been completed to date. Of special note is the completion of APPA's two major sponsored research projects. The first major research projects *Buildings... The Gifts That Keep On Taking: A Framework for Integrated Decision Making* and is intended to demonstrate the importance of integrated resource planning and management for both capital development and renewal/maintenance of all facilities. The resulting strategy should stimulate better decision making around capital development and maintenance/renewal by facilities professionals and senior institutional officers.

The second major research project is *The Impact of Facilities on Student*

Recruitment and Retention. Forty-six institutions responded, ultimately garnering 16,153 student responses to the survey. The data has been analyzed and the final results published across two articles in APPA's *Facilities Manager* magazine (March/April and May/June 2006 issues).

Both research projects' contribution to the body of knowledge for the facilities profession and impact on higher education senior institutional officers' decision making is impressive. Please make sure you get more detailed information from APPA's website on these two projects. It is this type of work that will ultimately brand APPA as the "go to" resource for educational facilities questions.

Continued on page 27

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Continued from page 24

Finally, as part of our strategy to expand research, APPA, through the gracious sponsorship of Carter & Burgess, developed and delivered a Thought Leaders Series Workshop this past May. A group of key higher education stakeholders consisting of chancellors, presidents, regents, business officers, facilities professionals, and representatives from the business community were assembled and engaged in a day-long discussion of the drivers of change expected to shape the future of higher education and their impact on facilities. Key findings from the workshop will be published in a monograph and disseminated to facilities professionals and senior institutional officers early this fall 2006.

The content and appeal of APPA's vast array of educational programs (Institute for Facilities Management, Leadership Academy, and the Supervisor's Toolkit) continue to provide members with the professional and personal growth and development needed to compete and collaborate effectively in today's environment. And, to meet your continuing education/ licensure requirements, look for the CEUs and PDHs that are now being offered for many of our courses and programs.

Of particular note is the complete reformulation of our annual meeting (now simply called "APPA 200X"). We will focus on professional development programs and the hottest topics for the educational facilities professional. We will collaborate with other allied associations and governmental agencies for program development and delivery. This approach will strengthen this offering in a number of ways and ensure differentiation from regional and state chapter meetings. Also, we will deliver a distinct program strictly for senior facilities officers called the "Senior

Facilities Officers Summit" within the same venue. These two educational programs will serve the continuing professional development needs of both mid-level managers and senior facilities officers. These activities are considered essential by the volunteer leadership to provide for a continuum of professional development opportunities for the educational facilities professional.

To add to our complement of competency-based programs and services, APPA's Board of Directors has approved the development and execution of two credential/certification programs. The first credential will be a curriculum-based credential/ designation for the **young** educational facilities professional. The second credential will be a certification for the **seasoned** professional that will incorporate both the body of knowledge of facilities management and successful demonstration that knowledge has been shared and applied at the institutional level. This step is essential for the future engagement of our young facilities professionals in APPA and the educational workplace.

Collaboration

Strategic collaboration and partnering continues to occur on a number of fronts and increases the depth and breadth of research and information and ultimately the value you receive as part of your membership. Our latest association strategic alliances have expanded the collaborative opportunities available to you. Visit our website for details about our combined offerings to take advantage of these relationships.

The joint conference collaboratively planned with NACUBO (National Association of College & University Business Officers) and SCUP (Society for College & University Planning) in Honolulu, Hawaii, July 2006, just occurred offering a seminal educational program. We couldn't be more pleased

with the members and business partners' high level of participation. For example, we received almost a thousand proposals for 150 educational programming slots alone. The **Campus of the Future: A Meeting of the Minds** joint conference truly represents the ultimate opportunity for collaboration and partnering.

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 our members and provide opportunities for more meaningful engagement by young facilities professionals.

Credibility

Environmental issues and compliance concerns remain an important part of our public policy agenda. APPA is one of six organizational members of the EPA College & University Sector Initiative that is focused on reforming the hazardous materials regulations and establishing better environmental performance measures and systems. This alliance consists of the ACE (American Council on Education), NACUBO, CSHEMA (Campus Safety, Health, and Environmental Management Association, a division of the National Safety Council), HHMI (Howard Hughes Medical Institute), and C2E2 (Campus Consortium for Environmental Excellence) and continues to drive our efforts to create and maintain a substantive dialogue with the EPA. As a matter of fact, the hazardous materials regulations have now been modified substantively and posted for public comment. Therefore, significant progress is being made regarding regulatory change in hazardous materials/waste compliance. This effort is 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.

In addition, we have partnered with the EPA's Energy Star staff and have agreement for the future development of a college and university focused Energy Star Rating Tool. To accomplish this end, we will need your help in submitting aggregate energy consumption data (among other data elements) this fall. Look for our specific request in September. This data will also be incorporated in our *Facilities Core Data Survey* data collection effort. Either way, we need a minimum of 350 institutions to participate in order to move forward with the EPA. In the meantime, we are partnering with Sebesta Blomberg to secure 15 to 30 institutions for a

consortium-based pilot program to drill down into the details of energy metered data for various space types as a supplemental effort to that of the EPA's Energy Star program requirements.

I cannot emphasize enough the importance of APPA's primary role to increase the awareness of the facilities profession with senior institutional officers. Our brand identity in education is reflective of this goal and its continuous attainment. Certainly, the challenges we face well into the future will require our best collective and collaborative efforts. Your contributions will be key in helping to shape the future of education. APPA's contributions will be key as a significant voice on strategic institutional

issues for the educational facilities profession.

I firmly believe 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. These are difficult and trying economic times. The decisions you face and the priorities you make must be strategic. We are pleased to be part of your strategy for your individual professional development and continuous institutional improvement.

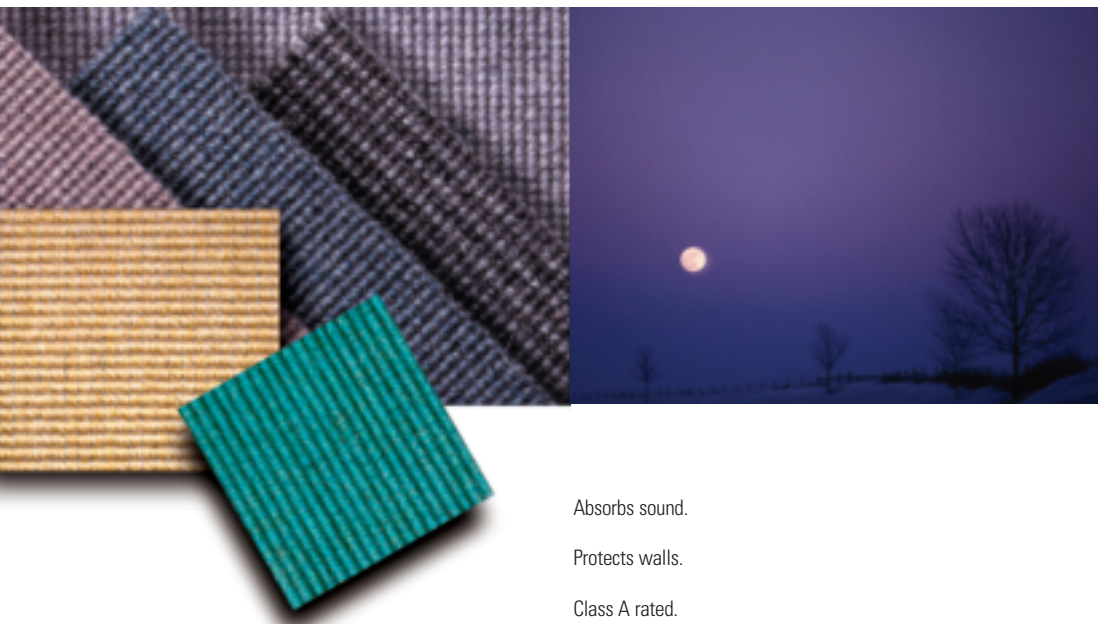
Therefore, we appreciate the value you place on your membership in APPA and in our professional development programs, targeted publications, and meaningful recognition

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and awards programs. Our efforts to focus on the grassroots of this organization will continue in the coming year to ensure that your needs and expectations are being heard and ultimately met. I truly believe that it is through the vast array of educational offerings, print and electronic information and research, and publications

that APPA can help you gain that competitive edge and enhance your professional image. 🏛️



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