

2006 2007 APPA

SERVING EDUCATIONAL
FACILITIES PROFESSIONALS

ANNUAL REPORT

President's Report

— Christopher K. Ahoy

As APPA's 92nd president, I have had the unique opportunity to meet colleagues and make friends locally, nationally, and internationally. I have been very happy to share APPA's value propositions. My deep appreciation goes to my wife, Ruth, and to my institution, Iowa State University, for providing the time I needed to make the necessary three-year commitment for this APPA leadership journey. It has been my privilege and honor to represent APPA at many venues and to make presentations, contacts, and connections.



Administrative Activities

- **Strategic Alliance Partnerships:** The Council of Higher Education Management Associations (CHEMA) is an informal, voluntary assembly of 35 management-oriented, higher education associations in the United States and Canada. The association provides a platform for sharing information and comparing experiences and opportunities. This allows for us to work collectively on projects of common interest. I attended the CHEMA conference this June in New Orleans with Alan Bigger. It was a very productive meeting.

- **Collaboration with Students:** I gave an Overview of APPA presentation to student chapter members at Brigham Young University and a presentation on Leadership in Educational Facilities Administration at their Thursday morning facilities management class. Both sessions went well.

- **Credentialing and Certification:** A new board of directors was established in January 2007, with goals and objectives surrounding the development of two credentials – Educational Facilities Professional (EFP), and the Certified Educational Facilities Professional (CEFP).

- **The Thought Leaders Summit:** This meeting germinated from a need identified in the 2005 Stratton Report. Under the astute leadership of Lander Medlin, we have received interest and funds from two sources (Carter Burgess and IBM). This new initiative started in 2006 to increase the body of knowledge for senior facilities officers. I am pleased and fortunate to have been a part of the second 2007 Thought Leaders Summit.

International Collaborations

- **Singapore International Chapter:** My trip to Singapore in September 2005 sowed the seeds for the establishment of a new Singapore International APPA Chapter. A Memorandum of Intent was signed in Chinatown, San Francisco, California, after the COTF Conference. This was followed by an official MOU signature ceremony by President-Elect Alan Bigger and David Ng, National University of Singapore Director of Estate in September 2006 at the NUS campus.

- **HEFMA Conference:** My October visit to the Higher Education Facilities Management Association of Southern Africa (HEFMA) Conference in Kimmeldrift, Pretoria, South Africa, was well received. It was a great honor to be the opening keynote speaker, as well as an elective session speaker. President du Plessis and I signed a memorandum of understanding to foster collaboration between HEFMA and APPA. During the next three years, both organizations will mutually explore detailed actions around the basic goals and objectives in the MOU.

- **AUDE Conference:** Representing APPA at the 2007 AUDE conference at the University of Bath campus this spring was a delight. I visited University College Dublin in Ireland. It was good to catch up with old friends as well as at the World Heritage City of Bath, UK. Thanks to our host Patrick Finch, Director of Estates, and his world-class personal assistant, Jayne Eyles, for their hospitality and conference at University of Bath. Rod Mallinder, AUDE secretary, is coming to Baltimore in place of Chair, Peter G. Kerr, MRICS, Director of Estates Building Services, Heriot Watt University, Edinburgh.

Regional and Chapter Meetings

- **PCAPPA Regional Conference:** My first visit as APPA President to a regional meeting was in San Jose, California. Thanks to the PCAPPA leadership team for the warm Pacific Coast welcome, and for inviting me to be present at their Board meeting. I had the honor to install the incoming PCAPPA 2006-2007 officers at the banquet.

- **SRAPPA Regional Conference:** My second visit as APPA President was to the SRAPPA Region's 55th annual conference. Thanks to SRAPPA for the warm southern welcome, hospitality, and for making me feel at home at the SRAPPA Board meeting. I was deeply honored to be asked to install the SRAPPA incoming officers.

- **FLAPPA Conference:** The Florida chapter leaders and their team made me most welcome and asked me to introduce the keynote speaker, APPA Executive Vice President Lander Medlin, whose opening session keynote on "The Association of Choice, Serving Educational Facilities Professionals," had the audience of approximately 197 attendees in stitches. I gave presentations on "Ownership in Sustainability," and "APPA's 7 Key Strategies" at elective sessions. I joined the panel in the general session roundtable on the subject, "Is There Value in Value Engineering?" The highlight was installing the new officers of FLAPPA at the banquet ceremonies.

- **GAPPA Conference:** I attended the 42nd annual meeting of the Georgia APPA chapter (GAPPA) in Jekyll Island, which is the former playground of the 54 multi-millionaire's who formed a club in the early 1800s to get away from the winters in the eastern seaboard cities. President David Smith and his team gave us a warm welcome. As the APPA international President, I was

privileged to install the incoming 2007-2008 officers at their banquet. Lander Medlin was the keynote speaker giving the closing breakfast remarks on the last day and asked me to give them an update on the 7 Key Strategies and their importance in aligning our organizations at the chapter, region, and international levels.

Progress of 7 Key Strategies

APPA has faced extraordinary challenges and made major accomplishments. With every new challenge comes new opportunities for us to build a stronger, more prosperous APPA community.

Thank you to all APPA members, Board members, regional representatives, regional and chapter leadership, international colleagues, and APPA staff for your unflinching support and confidence. Thank you for allowing me to lead in the work to create the association of choice, encompassing our vision to become global partners in learning, to achieve our mission to support educational excellence with quality leadership and professional management through education, research, and recognition.

APPA's Key Strategies

1. Develop and execute a branding initiative.
2. Develop and implement an enhanced website to become the "go to" resource for facilities questions.
3. Expand research to build credibility and visibility by senior institutional officers.
4. Engage in symbiotic and collaborative partnerships.
5. Engage young facilities professionals.
6. Provide targeted, cutting-edge educational programs.
7. Establish credible and valued credentialing programs for individuals and institutions.

Immediate Past President's Report

—Jack K. Colby



I am pleased to submit this report on my activities as APPA's Immediate Past President. It has been a very exciting year to be associated with the APPA Board, as we have made tremendous progress towards realization of the 7 Key Strategies and APPA's vision to be the Association of Choice for Educational Facilities Professionals.

Professional Certification Program

In February 2006, the APPA Board approved the recommendation of the Certification Task Force to move ahead with the development of a two-step process of credentialing. The first step would be a knowledge-based credential, the EFP or Educational Facilities Professional, which would be delivered to the membership in September 2007. The second step would be to full professional certification through the CEFP or Certified Educational Facilities Professional designation and would require a knowledge base and also an experience component.

In the 12 months that followed, the interim Board for the certification program worked diligently to create bylaws, operating procedures, articles of incorporation, and tax status for the new organization. We selected names for the program and for the two designations. Eligibility requirements and selection criteria were established. Most importantly, a consultant, Prometrics, was selected to guide us through the process of creating the examinations based on the body of knowledge of our profession. On January 5, 2007, the APPA Educational Facilities Professionals Certification Board was formally established. Board members were selected, officers elected, a budget was adopted, and the new organization was finally a reality.

Since January, great progress has been made to meet the targets of delivering a preparatory course at the APPA 2007 meeting and administering the first exam at the September APPA Institute in Phoenix. A group of APPA's best "subject matter experts" have met to provide their knowledge of our profession to the effort. We are on track to successfully meet the targets and begin to develop the full professional certification in 2008. The new program has already created a great deal of anticipation from Institute grads and attendees at APPA's educational programs. Meeting the needs of APPA's young professionals is our primary goal. The time for an APPA certification program is NOW.

First Thought Leaders Series Monograph

In May of 2006 APPA brought together a distinguished group of higher education leaders to identify the major driving forces that were changing the landscape of higher education today and in the future. From these forces, the group was able to forge the top 10 facilities issues that our organizations will face and how we should prepare to meet them. In October, after a tremendous amount of work to synthesize all the information and to add value to the discussion, the results were assembled in a monograph that was widely distributed to our membership, our sister organizations, and to our strategic alliance partners. The document has been a major success and has set the stage for an ongoing series of publications. Lander Medlin, David Cain, and Steve Glazner should be recognized for their tireless work to make this valuable tool available to our membership to better prepare them for the challenges ahead. Also, the sponsorship of our partner Carter Burgess has made the Thought Leaders Series possible.

APPA Nominating Committee

Beginning in July 2006 the Nominating Committee, comprising the senior regional representatives to the APPA Board, began its work to identify a slate of nominees to become elected officers of APPA. We were fortunate to have an exceptional list of nominees submitted for consideration. When the committee met in February, the decisions were difficult given the high quality of the entire list of nominees. I am certainly appreciative of all the work of the Nominating Committee and also the willingness of APPA's best to step forward and seek office. Thanks to all those that participated and congratulations to our new APPA officers.

Second Annual Thought Leaders Series

The second Thought Leaders Series meeting was held in April 2007 at the Carter Burgess headquarters in Fort Worth. The focus of the discussion by the group centered around two topics that came out of the first Thought Leaders session: technology and changing stakeholder expectations. Both topics and their impacts on higher education were examined in depth. The effects of competition in higher education on each topic were examined. All the discussion content was used to develop the potential impacts on facilities and provocative questions that should be asked by the leadership of each campus. The meeting was a great success with a second monograph expected in September 2007.

APPA Facilities Data Benchmarking for UNC System Institutions

In North Carolina our 16 institutions are involved in an initiative to promote effectiveness and efficiency in the way we run our universities. As chair of the Facilities Management work group, I was able to move forward with an initiative to utilize the APPA Facilities Core Data Survey and the resulting Facilities Performance Indicators to benchmark the facilities organizations at each campus. This effort will not only benefit the campuses but will add 12 institutions to the survey. APPA will be asked to deliver training to campus teams and to facilitate the input of data, thus creating a model whereby other systems may implement FPIs and benchmarking for their institutions.

Thought Leaders Series Presentation to the Senior Facilities Officer Summit

At the Senior Facilities Officer Summit in July, I had the opportunity to present outcomes of the Thought Leaders Series to SFOs as a part of a panel on APPA initiatives. Our goal was not only to provide SFOs with new information on the driving facilities issues in higher education, but to re-engage them to be aware of how APPA can help their organizations.

It has been a tremendous pleasure to represent APPA in many capacities over the past 12 years that I have served on the Board. Our association is indeed blessed with a clear vision, inspired leadership, a gifted staff, and a spirit of collegiality and professionalism that I have yet to witness in any other organization. I encourage all of you to consider serving your chapter, region, or the international organization. The rewards and benefits will make it an experience that you will always remember. My personal thanks go out to all the APPA members that I have had the pleasure to meet and work with over the years. Thank you for giving me this opportunity to serve you.

President Elect's Report

—Alan S. Bigger



The past year has been an exciting and hectic one. Thanks to APPA, I have had the opportunity to visit Singapore, Australia, New Zealand, Rocky Mountain APPA (RMA), MAPPA (even though it was a short visit), and the West Virginia chapter of APPA. I also had the opportunity to visit a student chapter of APPA at Brigham Young University. All of these visits reinforced that being a part of APPA is an incredible honor and APPA is what it is today because of fantastic members and a highly dedicated office staff.

Years ago I was stationed with the United States Air Force near Rapid City, South Dakota. Many military members did not really wish to go to South Dakota, preferring more moderate and less extreme climates. When I arrived and saw the beauty of the Black Hills and experienced the way South Dakotans lived, I realized that an assignment to Rapid City was really one of the best-kept secrets in the Air Force. It was a wonderful assignment, however to many Air Force members it was a story that really went untold.

Like Rapid City, APPA's story has long gone untold. In 2006, APPA President Jack Colby, the Executive Committee, and Board thoroughly evaluated the perceptions of APPA by the membership and developed 7 Key Strategies to be implemented over the next few years. It became quite apparent from the feedback of the

membership that APPA really does need to tell its story more effectively and to position itself as the front runner of all facilities management associations. APPA has world-class, cutting-edge programs; however, these need to evolve, over time, to keep APPA at the head of the pack. In a very real sense, we all have to tell APPA's story today so as to position ourselves for tomorrow.

Jack Colby helped to pave the way and started the implementation of the seven strategies. Chris Ahoy, our current president, has sought to solidify the strategies throughout the APPA organization and to ensure that there is alignment between the members, the regions, and APPA at the international level. Thus, APPA is in an exciting position to tell its story to the world and to seize the day – if we do not, many facilities managers will miss one of the best assignments available, membership in APPA.

Three terms or phrases probably best summarize the vision and theme for my term in office, and working together at all levels we can exceed the vision of any one person: *carpe diem*, *renovare*, and *kaizen*.

Carpe diem, meaning seize the day, indicates a state of urgency as we move forward. Over 30 percent of APPA's senior institutional members will retire during the next five to seven years. We know that this turnover is going to occur, so now is the time to address the issue. If we really have a wonderful story to tell, are we telling it to our executive leadership? Are we mentoring and encouraging those that work with and for us to become involved in APPA?

As the membership changes we must provide cutting-edge programs that are of value to the current and evolving membership. APPA's surveys clearly indicated the need for ongoing certification and credentialing programs, and the start of these programs will kick-off in Baltimore at APPA 2007. However, if we build the programs, will people come? They will, if we get out and tell the story and involve tomorrow's leaders today.

Now is the time for all in APPA to seize the day. Our involvement will determine the success of any strategies. The clarion call is to act today, tell the APPA story. It is imperative that the seven strategies be carried from concept to fruition. For the next year we need to seize the day, *carpe diem*.

Renovare, meaning "to make new," is a call for all of us to become involved in the renewal of APPA. APPA has been in existence for over 90 years, and the days ahead are exciting. During these 90 years APPA, through the foresight of previous presidents and boards, has renewed itself to face the challenges of the day. Today, APPA is faced with the challenge of providing meaningful programs to all its constituents worldwide. As the marketplace of ideas evolves, APPA needs to be renewing itself each day. It is critical that as we "make new," we also become involved by renewing ourselves, planning and attending APPA programs, and

telling the story of these programs to fellow members and those outside of APPA. The demand today is for cutting-edge programs, cutting-edge websites, webinars, podcasts, credentialing, and research. These are just some of the areas that APPA can continue to “make new” – *renovare*. In the next year, we need to apply the spirit of *renovare* to ourselves and all levels of APPA.

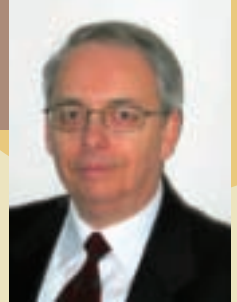
Kaizen, meaning “continuous and orderly improvement,” is a gradual process that implies that individuals and organizations should strive to improve. Even as we embark on the 7 Key Strategies and seek to “seize the day” and to “make new” it is imperative that APPA implement processes throughout the organization to strive for continuous and orderly improvement. We, as members, need to actively support the APPA Executive Vice President, the APPA staff, and the various APPA committees as they strive to develop APPA into a world-class organization. All APPA programs should be able to clearly demonstrate that they match or exceed industry benchmarks, not only within comparable cohort groups, but also with other world-class programs, both “inside” and “outside” of the box.

APPA should set the benchmark for excellence in all that it does and improve in a continuous and orderly manner to provide increasing value to the membership. We cannot sit on our laurels – all that will do is crush them. We need to have the most dynamic membership program possible so that the organization will flourish and grow, and not remain flat. We need to tell our story in such a way that all of our education and credentialing programs are sold out. We need to develop the best research in the facilities world so that people will clamor for the research. Our website should be such that it wins national awards for its effectiveness. Every aspect of APPA should be demonstrating orderly improvement each and every day. APPA cannot survive in a “business as usual” environment. All that we do should be business as unusual that clearly demonstrates *Kaizen* in action. For the next year, all elements of APPA need to concentrate on *kaizen*, continuous improvement.

Jack Colby, Chris Ahoy, the APPA Executive Board, the APPA Board, APPA regions, and the APPA international office have outlined seven exciting strategies for the organization to implement. Taking the strategies from concept to successful implementation will require the involvement of all stakeholders in APPA to **carpe diem** – seize the day; to **renovare** – to make new; and **kaizen** – to show continuous and orderly improvement in action. No single entity can make all of this happen. It can only happen if we work together. The implementation and fulfillment of the meaning of “*carpe diem*,” “*renovare*,” and “*kaizen*” will position APPA for its second successful century as the organization of choice for facilities professionals worldwide.

Secretary- Treasurer’s Report

—Robert J. Carter



APPA is in the midst of a three to five-year implementation of the 7 Key Strategies in an effort to position APPA as the association of choice for educational facilities professionals. To effectively achieve this, significant resources have been identified and reflected in a five-year business plan.

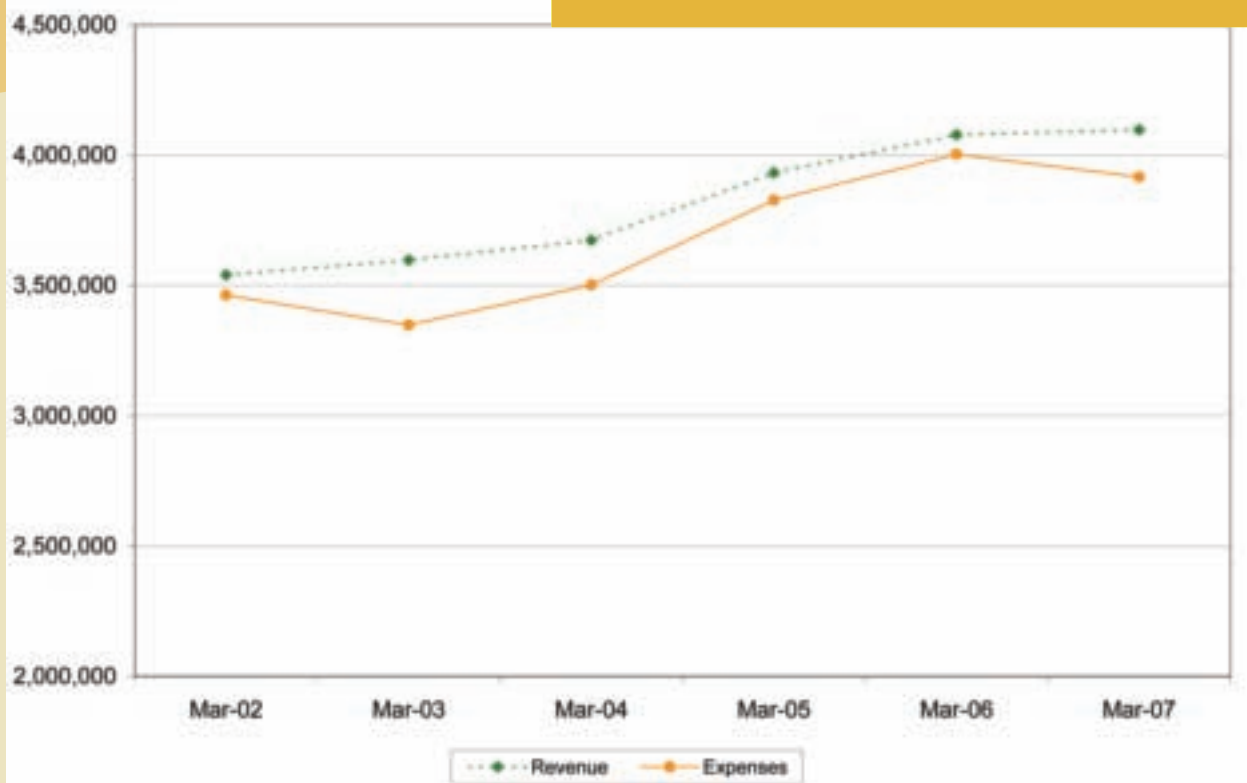
In the fiscal year ending March 31, 2007, we have completed the year with a substantive surplus of \$180,342 (\$151,438 from the operation; \$28,904 from an equity investment gain), even with the continued outlay of some significant expenditures. This surplus will exceed the zero-sum budget approved for the prior year by the Board. Of the surplus, \$50,000 was contributed to the operating reserves with the remainder being held in current operating funds. These reserves now stand at \$973,000 (excluding the equity gains in long-term investments) or 86% of the \$1,147,000 goal that represents 25% of the operating budget and 10% of the estimated replacement value of our physical assets. The APPA headquarters building was assessed for approximately \$2.1 million in February 2007 by the City of Alexandria, and the building is fully paid.

Graph 1 on page AR-6 shows the six-year history of revenues and expenses for APPA. Graph 2, also on page AR-6, shows the year’s revenues and expenses by activity category. Membership expenses, totaling \$491,133, reflect the direct cost of membership department salaries; benefits; travel and outreach efforts; printing, production and mailing of promotional materials and the membership directory; and other program supplies and equipment needs. However, membership dues support the direct cost of many APPA activities such as website and database management; research and development; and a portion of office operation and governance. Revenues and expenses are planned and monitored by staff and the APPA Board to achieve APPA’s mission to support educational excellence with quality leadership and professional management through education, research, and recognition.

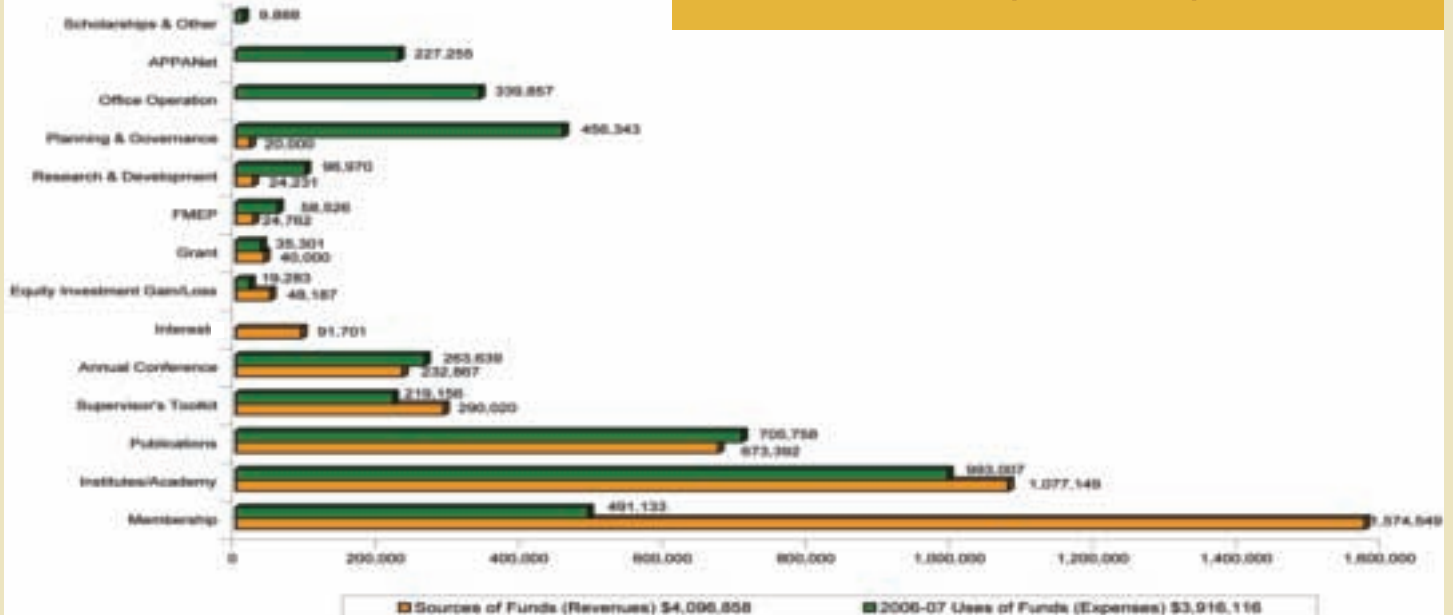
APPA’s equity investments have achieved another positive overall return as a result of continued strong market conditions. The investment objective for this portion of the reserve is long-term capital appreciation, so fluctuations in the magnitude of returns from year to year will occur.

The APPA staff continues to do an excellent job in controlling expenses and managing the entire budget. On behalf of the membership I would like to offer my sincere appreciation.

GRAPH 1:
APPA'S History of Revenue & Expenses



GRAPH 2:
2006-07 Uses of Funds (Expenses) & Sources of Funds (Revenues)



Membership

It was a very productive year for the Membership Committee as it built on the initiatives that were identified over the past few years.

Recruitment of Young Professionals

The APPA Membership Committee had lengthy discussions surrounding how to communicate and engage young facilities professionals. Several initiatives are underway:

- Attendees to the Supervisor's Toolkit are shown the APPA informational CD and receive materials from APPA. This was done for the first time at the January Supervisor's Toolkit in Orlando, Florida, and will continue.
- Education program attendees (regardless of membership status) began to receive *Inside APPA* in February 2007.
- A new column, "Career Corner," will appear this fall in *Inside APPA*. It will focus on the career and professional development needs of educational facilities professionals, especially younger facilities professionals.
- As part of the dues renewal process, APPA will send a form to member organizations asking them to list additional staff members they would like to receive periodic electronic updates and information.
- Creating a flyer that promotes the professional development aspects of APPA to younger facilities professionals. The flyer will be distributed to attendees at our various education programs.

Recruitment of Institutional Members & Marketing Penetration

The APPA Membership Committee discussed some of the various methods and tools that people can use to approach non-members in their own geographical areas. The template developed includes the following:

- Begin an e-mail relationship with a non-member out of a need on your own campus (solicit advice).
- Build the relationship before introducing membership.
- Customize the approach to the geographic area or organization.
- Invite a non-member to an upcoming chapter, region, or APPA event.
- Get a business partner to sponsor a lunch for non-members.

The committee decided to conduct outreach to some large schools that are members of both NACUBO and SCUP but not APPA. A list of 24 medium to large non-member institutions that belong to NACUBO and SCUP (but not APPA) was compiled. Each region has three to five schools. The APPA Membership Committee has received this information are working with their respective regional boards and volunteers to conduct outreach to these non-member institutions in 2007.

Committee members will think long-term and cultivate a relationship with these schools and involve other member schools in the surrounding area in the relationship-building process. They will also track whether contacts are made; the degree of responsiveness; if the schools attend a chapter, region, or APPA event; and if they join APPA.

The committee also established a plan to recruit prospective members from institutions that are regional members but not APPA members (this only applies to those regions who do not require regional members to be APPA members as well). Lists were sent to the appropriate regions and the regional Membership Committee representatives, along with their regional boards and volunteers, will identify three or four schools to recruit in 2007.

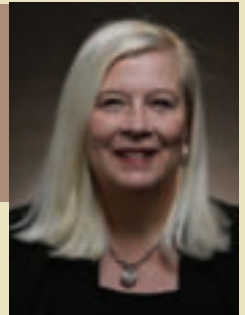
We developed an APPA/Region PowerPoint/video presentation to present at several regional meetings last fall. Based on feedback from the regions, APPA is working to update this presentation to include region-specific information and to be more compatible with standard computer equipment.

Alignment of APPA and the Regions

The committee believes it is critical to include APPA regions and chapters in the rebranding process so we can create a unified brand. The regions are being encouraged to ensure that their websites contain an area that visually identifies the region as being part of the APPA organization, such as placing the APPA logo on their homepages. Another recommendation is to list APPA's regions on APPA's homepage.

Vice President for Educational Programs

—Polly Pinney



The Educational Programs Committee and Annual Meeting Subcommittee, along with the deans and faculty of our Institute for Facilities Management, Leadership Academy, and Supervisor's Toolkit have worked hard to improve and enhance the educational offerings of this splendid organization. Without their creativity, talent, and extraordinary dedication, our work could not go forward.

The Educational Programs Committee, working under a new committee charge, created a new evaluation form for programs, mapped out the needs and demographics of our participants, and discussed next steps in further collaboration with our regions. We have combined their considerable talents to produce change and great progress. I am honored to be able to work with them and applaud their dedication and efforts.

Supervisor's Toolkit — Nuts & Bolts of Facilities Supervision

APPA's first step in the professional development continuum, Supervisor's Toolkit, experienced a surge in popularity

throughout the United States and Canada. The program welcomed new qualified trainers who helped achieve the program's goal to advance supervisors into the next phase of their careers.

We developed new protocols and evaluations to provide seamless accessibility for individuals and regions to offer the Toolkit program and aide individuals who are the onsite preparation group with their duties. This program is unlike anything else in the professional development arena and really is the best value out there to take our frontline supervisory teams to new heights of excellence. Our Master Trainers continue to ensure that the material being offered is cutting edge, and several qualified trainers have provided this training throughout our regions since the inception of the program. I thank these groups for their time and talent.

Institute for Facilities Management

As APPA's premier educational offering, the Institute continues to provide a solid professional development tool to the membership. Our most recent program, held in Orlando, Florida, in January was marked by sold-out attendance of nearly 500. The Institute continues to welcome nearly 1,000 participants annually for top-notch training in the facilities profession. Thank you to the faculty who gave of their time, talent, and valuable skills for each Institute.

Leadership Academy

April marked a sold-out offering of the Academy in San Jose, California, with more than 140 professionals from across the United States, Canada, and England. The energy and commitment of the participants was positively palpable at the graduation ceremonies, and I know that these individuals carry this home to their institutions with a renewed commitment to excellence.

SFO Summit

APPA has seen growing evidence that our educational offerings may not be adequately addressing the needs of senior facilities officers (SFOs) who seek an opportunity to network and discuss challenges and issues with their peers. The issues experienced by SFOs are long-term, often abstract, and require innovative and creative solutions. These solutions have often been discovered by networking with peers who have faced similar issues. Based on feedback from our membership, we have created APPA's *Senior Facilities Officers Summit*, to address the needs of our most senior members.

The Summit was designed by a task force of SFOs from the APPA membership. The program will feature national and international speakers on topics specifically concerning SFOs and includes sessions that explore specific areas identified by attending SFOs. We are encouraged that this invitation-only event will address the needs of this facet of APPA's membership and provide an arena to network with colleagues and determine the future of facilities on their campuses.

APPA 2007

Utilizing survey instruments and lessons learned from last year's Campus of the Future joint conference, a dedicated team of your colleagues has crafted a new opportunity for our membership to gather and recharge this summer at APPA 2007: Back to the Future, in Baltimore, Maryland, July 15-17.

APPA 2007 features experts who will infuse our minds with creative and innovative thoughts about the future solutions to our most pressing issues in three key areas: energy strategies, workforce demographics, and emerging technologies. The enhanced framework will consist of daily opening plenary and general sessions, followed by panel sessions and breakout sessions designed to provide practical tools and technologies to use on current and future projects on your campus.

Final Notes

All of these activities would be impossible without the incredible support of the APPA staff, most notably Suzanne Healy, director of educational programming. She, and each member of APPA's staff, takes multitasking to new levels. Their talent and dedication are truly awesome to witness.

Many thanks also to the members of the Educational Programs Committee, Institute and Leadership Academy deans and faculty, Supervisor's Toolkit master trainers, the SFO Summit Subcommittee, and conference presenters.

And finally, I want to express my gratitude for the incredible opportunity to serve APPA. It is truly an experience of great enrichment. I look forward to the next year, confident that, with the talented and dedicated individuals I work alongside, great things are in our future.

Vice President for Information and Research

—Michael J. Sofield



This has been another very busy year for the Information and Research Committee.

The committee worked from July to December to finish refining and testing the online version of the Facilities Performance Indicators (FPI) reports and the associated dashboard indicators prior to the release of the results in February.

This year's Facilities Core Data Survey (FCDS) data collection opened last August and closed in mid-December. The survey

instrument was again refined in response to the many comments received in the latest survey. Planning is underway to open this year's survey later this summer and produce the FPI reports by early spring. This cycle allows for data entry after fiscal reports have been completed on campus, with the FPI reports available during budget development time in the early spring. We are currently preparing FCDS/FPI workshops for the regional meetings this fall.

An executive summary of the 2006 Facilities Performance Indicators report will be published and distributed to all members. Some 165 member institutions completed some or all of this year's survey. There has been increasing interest in the survey and reports from a number of state systems, and planning is underway to provide training for at least one system this year.

We recently launched the new Web-based version of the FPI, which includes graphic dashboard indicators. The continuous improvement for the survey and reports is facilitated by Maggie Kinnaman, to improve the survey instrument and make it a relevant planning tool. The annual survey will open in August. If you completed the current survey, your data will be pre-populated, so you will only need to update those areas that changed during the year.

One of the recent developments from Information and Research is a work in progress to create a graphic dashboard that displays key indices from the FPI report. Members can customize the display of data by plotting a goal value to display along with their relative position on each "dial."

APPA continues to pursue comprehensive publications for our members. *Facilities Manager* magazine remains a leader in our industry and has attracted a vibrant advertising base, along with a wide variety of timely and in-depth articles.

The magazine is supplemented with a monthly electronic newsletter — *Inside APPA*. This e-newsletter contains breaking news and information to keep members current on changes in our profession. Publications recently published and/or currently in development for future release include:

- *The Impact of Facilities on Retention and Recruitment of Students* by David Cain & Gary Reynolds (an executive summary that appeared in March/April and May/June 2006 issues of *Facilities Manager*, CFaR, April 2007)
- *Buildings... The Gifts That Keep on Taking: A Framework for Integrated Decision-Making* by Rodney Rose, with contributions by David Cain, Jack Dempsey, and Rich Schneider (CFaR, July 2007).
- *Sustainability Anthology* by Walter Simpson (December 2007)
- *Space Planning & Utilization* by Ira Fink Draft (co-publication of APPA and SCUP, January 2008).
- *Facilities Reinvestment* by Harvey Kaiser (January 2008)
- *Leadership in Educational Facilities Administration* by Chris Ahoy (July 2007)

Facilities Management manual revision (fourth edition): Work is now underway to produce the fourth edition of our benchmark guide to facilities management. Maggie Kinnaman is leading this task as we review the core body of knowledge, identify key areas to update, and determine new ways to make the information available across all mediums. This is a major undertaking that will involve volunteers from across APPA's committees and membership at large.

APPA Web

This year, a small task force of I&R committee members — led by Norm Young — has been working with APPA staff to develop an enhanced APPA website. Content issues are being reviewed as well as form and functionality. These efforts are linked to several of APPA's 7 Key Strategies and promise to make the site a virtual warehouse of facilities management information. It will also serve as the repository for member's "MyAPPA" information, education, and publications needs.

Center for Facilities Research (CFaR)

CFaR is producing outstanding studies and reference material for your use. At the Campus of the Future conference last summer, CFaR formally released two significant original research studies, *Asset Investment Strategies* and *Facilities Impact on Student Recruitment and Retention*. These studies were featured presentations during the COTF sessions and were the subjects of a press conference. Several follow-up articles were subsequently published in *Facilities Manager*.

This year we will again recognize the student research projects conducted at Brigham Young University. The student research competition process has evolved within the CFAR framework and will lead to expanded opportunities for students in the years to come.

Final Notes

I am amazed at the results produced by this committee and we remain focused on disseminating new FCDS and FPI data for members. Congratulations and thanks to this hard-working group; they exemplify the best of APPA. My sincere thanks and gratitude to: Norman Young, ERAPPA; Dan Young, SRAPPA; Jeri Ripley King, MAPPA; Terry Major, CAPP; Lorenzo Cotton, RMA; Richard Storlie, PCAPP; and Maggie Kinnaman, UMD-Baltimore; Darryl Boyce, Carlton University, both At-Large; and Steve Glazner, APPA's staff liaison to the Information and Research Committee. Special thanks also goes to Laura Long, LTL Collaborative, and our business partner ARCHIBUS, for their continued support in launching and refining the FCDS, the FPI, and the dashboard.

Vice President for Professional Affairs

—Dan Johnson



One of the most rewarding duties of the Professional Affairs and Awards & Recognition committees is reviewing 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 submissions for 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 seven submissions and five recipients of this award. In my seven years in working with PAC, I've never seen seven submissions. My most sincere thanks to the PAC committee for managing the site visits, especially those who did two site visits.

Effective and Innovative Practices Award

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. There were 23 submissions for this award. The Effective and Innovative Practices awards are underwritten by Sodexo and each institution will receive a cash award of \$4,000. We thank Sodexo 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.

Individuals must be active members of APPA for a minimum of 10 years; must have graduated from APPA's Institute for Facilities Management; have completed APPA's Leadership Academy; have presented research at an APPA or other higher education or facilities management organization conference; have completed an approved research project under APPA's Center for Facilities

Research; and must provide two letters of recommendation from colleagues. There were no submissions for the Fellow designation this year, but there are Fellow projects in the pipeline for next year.

Meritorious Service Award

Each year APPA members bestow the Meritorious Service Award upon the individual member or members who 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 four submissions for this award, and the maximum three were awarded.

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 10 submissions for this award, and six were awarded.

In addition to the awards:

- PAC is reviewing the current criteria for the Facilities Management Evaluation Program (FMEP) 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 that 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). We are in the process of recommending placement of code bodies to ASHRAE and later NFPA.
- 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 10 alliances that enable our organizations to network and cross-fertilize ideas and programs.
- APPA continues to work with the International Sanitary Supply Association in a collaborative manner.

Thanks to the APPA's Executive Committee and APPA Board for their support. Exciting times lie ahead as PAC, A&R, and all committees strive to meet the 7 Key Strategies. PAC and A&R look forward to working with President Bigger and President-Elect Elvey as we move ahead to accomplish the seven strategies.

Executive Vice President's Report

—E. Lander Medlin



Enrollments are increasing, state and federal appropriations are flattening or decreasing, and although one-time construction money is flowing, annual recurring funding still lags with little change in funds for periodic renewal of the facilities and utilities infrastructure. It is difficult to comprehend how long we can sustain these business practices. Given the continued escalation of state entitlement program obligations and federal defense spending, implications of the student loan scandal, and pressure for greater transparency and accountability from the Spellings Commission report, state and federal support is in flux and cannot be relied upon to solve the significant funding challenges facing higher education at this time.

Fortunately, APPA has received strong support from its membership, and a tangible, visible measure of that support is our financial stability. Our diverse portfolio of professional development programs, leadership growth opportunities, and a myriad of resources and services continues to serve us well. This solidifies APPA as the association of choice for educational facilities professionals.

Under the excellent leadership of President Chris Ahoy, we are continuing to implement our 7 Key Strategies over the next three to five years, aimed at the desired outcomes of competency, collaboration, and credibility for our members.

Competency

The guidelines and standards established by members over the past several years remain invaluable tools for resource allocation and strategic planning. APPA is the nucleus of publishing forward thinking books, periodicals, and reports on issues relevant to the educational facilities manager. The APPAinfo list is one daily tool more than 1,000 of our members use to keep a pulse on key issues and find effective solutions to various challenges.

The Center for Facilities Research (CFaR) 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 institutions need to make knowledgeable and informed decisions.

It is just this type of research that will help brand APPA as the “go to” resource for educational facilities questions. And, it is through these research findings and thought-provoking summits that we

will increase the awareness of the facilities profession with senior institutional officers and enhance the credibility of the facilities professional.

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

We have a new strategic approach for APPA's annual conference. The combination of experts speaking on solutions to the industry's most pressing issues and interactive panel discussions and breakout sessions strengthens the value of the conference in a number of ways. It also ensures differentiation from regional, state, and chapter meetings. Another new offering is a distinct program strictly for senior facilities officers — the Senior Facilities Officers Summit. The annual conference and targeted summit serve the continuing professional development needs of both mid-level managers and senior facilities officers.

To add to this continuum of professional development opportunities APPA's Board of Directors approved the development and execution of a certification program comprising two credentials. The first credential — Educational Facilities Professional (EFP) — is a knowledge-based credential targeted to the new educational facilities professional. The second credential — Certified Educational Facilities Professional (CEFP) — will be a full certification for the experienced educational facilities professional.

Collaboration

Strategic collaboration and partnering continue to occur on a number of fronts, increasing the depth and breadth of research and information and ultimately the value of APPA membership. APPA's latest work with National Association of College & University Business Officers (NACUBO), Society for College & University Planning (SCUP), and the Environmental Protection Agency (EPA) through the Smart & Sustainable Campuses Conference and the Higher Education Associations Sustainability Consortium (HEASC) is expanding the collective knowledge and network for institutional sustainability programs.

Last year's joint conference — the Campus of the Future: A Meeting of the Minds (COTF), planned with NACUBO and SCUP — was truly a unique collaborative event and highly successful by all accounts. These strategic alliances and partnerships help APPA leverage its resources to provide cost-effective programs, ensure an increased information flow, 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), 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. Significant progress continues to be made regarding regulatory change in hazardous materials/waste compliance.

Our efforts with Sebesta-Blomberg through the energy benchmarking survey are proving fruitful as a pathway to a meaningful EPA Energy Star rating tool and recognition program. The data elements and insights uncovered so far are being incorporated in our *Facilities Core Data Survey*.

I cannot overemphasize the importance of APPA's role in increasing the awareness of the facilities profession with senior institutional officers. Our brand identity in education is reflective of this goal and its ongoing attainment. Our commitment to programs, information, and services that improve the educational facilities professional's competency remains unparalleled. By coupling competency with our collaborative strengths, the credibility of our members, and the profession is further enhanced.

Our competitive advantage in this rapidly changing and challenging world is the fact that our members actively engage in our programs, find our products and services of great value, and continue to choose active membership. The decisions faced and priorities made by our members must be strategic. APPA is pleased to be part of the strategy for our members' individual professional development, the training and development of educational facilities staff, and for continuous institutional improvement.

Our efforts to focus on the grassroots of this organization will continue in the coming year. We will remain diligent in our efforts to fully implement the 7 Key Strategies to focus and direct of the profession and the association.

The challenges we face well into the future will require our best collective and collaborative efforts. Each member's contribution is essential in helping to shape the future of education. APPA's contributions will be the key voice for strategic institutional issues in the educational facilities profession.

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