

2009 | 2010 **ANNUAL REPORT**



PRESIDENT'S REPORT



By Polly Pinney

Last year in Vancouver I stood before you and paraphrased the great Bette Davis in *All About Eve*, with regard to the economic realities: "It is going to be a bumpy ride." And it has been bumpy indeed. But it has also been an extraordinary ride—a ride I will truly never forget. I also promised that after the rain the sun would again shine, and lo and behold, it is peeking through the clouds.

The Nuts and Bolts

This year brought many accomplishments for our association. Our business models for major programs were recrafted, and the list of creative endeavors mounted to support our revenue process was exhaustive. The diamonds produced by these efforts are impressive.

The BOK Goes Digital!

What an exciting new opportunity for all of us as APPA members! Our Body of Knowledge has been effectively launched in a new and exciting digital, searchable format and is available as an institutional subscription. The 56+ new and updated chapters from the third edition of the *Facilities Management* manual are now available to any individual at a subscribing institution and have been designed for ongoing timely updates. Many thanks to Maggie Kinnaman and the content coordinators and chapter authors who brought this product to fruition.

Stabilization of APPA's Financial Position

The financial challenges for our association this year have been a mirror of the economy and our own institutions' fortunes. Creative marketing and diligent business planning reduced a pending deficit for FY 2009-2010 significantly, and the Board Of Directors has deployed a conservative budget for FY 2010-2011.

Thought Leaders

First conceived in 2006 by then President Jack Colby, the Thought Leaders Series has become the beacon for the industry and APPA's educational programming as it defines the emerging trends and critical issues for the educational facilities profession. This year we delivered both the 2009 and 2010 symposia keeping, APPA on track and on point for our rapidly changing and emerging profession.

Revamped and Enriched Partnerships

This year we received ASHRAE funding for a CFaR project focusing on the Total Cost of Ownership (TCO). In addition, we launched a partnership with CAUBO, the Canadian Association of University Business Officers, aimed at creating an international opportunity for utilization of APPA's Facilities Performance Indicators survey and reports.

Strengthening Our International Strategic Alliances

Every industry has felt the change driven by a truly global climate. The facilities management profession is no different, and APPA has worked hard to both develop and maintain a large framework of engagement to ensure our presence in the delivery of educational facilities management services worldwide. This year I was privileged to represent APPA at the AUDE annual meeting in Belfast, Northern Ireland, hosted by Queens University Belfast, where I shared APPA's Top Ten Critical Issues for the facilities profession with partners from AUDE, TEFMA, and HEFMA. The striking likenesses and differences in our perspectives, approaches, and technologies are remarkable. The gracious hospitality of our hosts Patrick Finch, AUDE Chair, and Gary Jebb and his conference team was greatly appreciated. The facility profession worldwide and our impact on this profession are critical to our future as an organization, and our alliances are the ladder to our future internationally.

Programmatic Improvements

This year marked an update and revamp of the criteria for the Facilities Management Evaluation Program (FMEP) and the Award for Excellence, which realigned these important facilities management organizational assessment criteria with Baldrige quality criteria. And, I am truly pleased to report that we posted a measurable increase in certification participants by cresting the 100 mark (146 EFP graduates and 20 CEFP graduates), and a 74 percent increase in the FPI survey participation, largely due to an enhanced survey and outcome report documents.

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Regional Meetings

This year it was my privilege and pleasure to visit four of our six regions and attend their annual meetings. What a rich learning experience! The opportunity to celebrate each of the regions' accomplishments and sample the diverse flavor of each was wonderful! RMA in Tucson, Arizona was a true southwest fiesta focused on Learn, Lead, and Influence. Sessions focused on mentoring, developing our future leaders, the importance of leadership training, and leadership during change, all set in the beautiful Sonoran desert landscape. My thanks and congratulations to Eakle Barfield and to Chris Kopach and his conference team for a world-class conference.

Then it was on to ERAPPA set in picturesque Portland, Maine where we were all encouraged to imagine. This multi-track endeavor had topics on sustainability, facilities planning, people topics, and utilities and energy. My thanks to Keith Woodward, Dan Gearan, and the entire committee for a truly splendid event.

On to PCAPPA in Hollywood, California for a truly star studded affair, Lights, Camera, Action!, set within walking distance of Universal Studios. One of the more interesting educational approaches was the team-building activity at the Universal Studio lot where we teamed up to produce commercials. My thanks and congratulations to Mark Hunter, Ben Elisondo, and their conference team. It was magical!

As the tour of the regions came to a close I made my way to Daytona Beach for SRAPPA and a Race to Green, heavily focused on campus sustainability. Sessions on going green while staying out of the red, water conservation, greening restoration projects, and carbon neutrality were joined with a trip to the Daytona Speedway Experience and the Johnson Space Center. My thanks to John Malmrose, Dan Young, and their conference committee for a high-speed thrill!

At each of these annual meetings I was privileged to meet with the regional board, garner new acquaintances with members, and share some of the regions' issues and concerns. It was an educational and deeply rewarding experience and better prepared me to fulfill my role as APPA President.

Final Thoughts

As my term of office draws to a close I must recognize the incredible people with whom I have shared the privilege of serving. Our APPA staff is amazing. They do so much with so little in so many ways. Their creativity, diligence, and love for the profession impress me daily. In addition, I was blessed with a great Executive Committee, a dedicated and thoughtful Board of Directors, and a group of committees who love this association as much as I do and have worked diligently to help it survive and thrive. I am truly proud of what we have accomplished together.

And to the group of individuals who have supported this effort with their dedication—my ASU team—I say a hearty thank you and well done! These are the folks who served APPA by giving their support, encouragement, and dedication so that my service was possible.

And lastly, my thanks to Lander Medlin. Our journey both professionally as colleagues and as friends began many years ago in service to APPA at Notre Dame. I will never cease to be amazed and impressed by her energy, dedication, professionalism, and true passion for this organization.

It has been a magnificent experience this year. Last summer I wished for you the following: "May your horizons hold the treasure of diamonds, polished and brilliant." I can truly tell you—mine certainly has. ■

“May your horizons hold the treasure of diamonds, polished and brilliant.”

IMMEDIATE PAST PRESIDENT



By William M. Elvey

I am pleased to report on three major activities that I have participated in during the past six months: (1) Attendance at the 2009 HEFMA Annual Conference; (2) Attendance at the MAPPA 2009 Educational Conference and Annual Meeting; and, (3) Serving as the Chair of the Nominating Committee for the 2010 - 2011 APPA Officer Elections.

Goal 1 of the existing Memorandum of Understanding (MOU) between APPA International and The Higher Education Facility Management Association of Southern Africa (HEFMA) is to foster a commitment of collaboration by our respective organizations and our members to more effectively serve the facilities management profession in the North American and Southern African areas. In the recent past the Past President of APPA has been able to attend the HEFMA Annual Conference and this year was no different.

HEFMA 2009 was held October 19-23, 2009 at Rhodes University in City of Grahamstown, South Africa. The conference theme was "Sustaining Facilities Management in a Changing Environment" – this certainly sounds familiar doesn't it? Marcel Theron, HEFMA President, Deputy Director, Facilities Management at the University of Pretoria, South Africa and his team including Les Reynolds, Facilities Director at Rhodes University and Chair of the Organizing Committee, did an outstanding job of creating an interesting and entertaining event that has generated memories and friendships that will last a lifetime. Approximately 75 people from 18 member institutions, including 15 from South Africa, attended the conference. The leaders of our international strategic partners from the Association of University Directors of Estates (AUDE) of the United Kingdom and the Tertiary Education Facilities Management Association (TEFMA) of Australasia also attended HEFMA 2009.

The venue was quite different than one would expect as compared to a regional or APPA International meeting in that all of the attendees attended every educational session. A total of 15 educational sessions were held covering topics ranging from "Universities and Sustainable Building Heritages" to "Geographic Information Systems Assisting Maintenance Sustainability" to "Energy Efficiency in South Africa." Not surprisingly, all of the topics presented correlated highly with many of the same issues challenging the educational institution facility managers represented by APPA. Each international

association representative was also requested to give a presentation. The topic of my presentation was "Addressing the Maintenance Challenges of American Universities" that emphasized the role and importance that an association such as APPA can play in helping educational facilities managers meet today's many challenges. Social events included a visit to a local wild game farm for a tour and some local African cuisine, a visit to Summerhill Farm, a big pineapple farm where we also enjoyed an evening of entertainment and traditional food, and a gala dinner event and awards banquet. I am grateful that I was able to represent APPA at the HEFMA 2009 Conference and want to extend a hearty thanks to Marcel Theron for the hospitality received and to all those who helped make the event a success.

Another responsibility as Immediate Past President is to be able to represent current APPA President at one or more of the fall regional meetings. This year I was asked by President Polly Pinney to attend the MAPPA 2009 Educational Conference and Annual Meeting held September 27-30, 2009 that was hosted by the University of Iowa.

MAPPA 2009 was extremely well organized and a first-class event in all respects—from the time I registered to attend—all the way until the end of the President's Banquet. MAPPA President John Ott, and Don Guckert and Jeri King and the rest of the Host Committee from the University of Iowa, should be especially proud of their accomplishment. Despite the hard times of the national economy, over 300 persons still attended this regional conference. Some 29 different educational opportunities were presented including several "On-site Learning Experiences" such as "Power Plant, the Flood, and Alternative Fuels," "LEED Building," and "Flood Recovery and Mitigation." One of the personal highlights for me was being able to administer the Oath of Office to MAPPA's incoming Officers and also personally recognize Kris Ackerbauer, one of the five recipients of the APPA 2008—2009 "Unsung Hero Award" that was given by me in lieu of the more traditional President's Awards at APPA 2009 last July in Vancouver, British Columbia.

The final major activity, and also a major responsibility of the Past President, is to act as Chair of the Nominating Committee for recommending a slate of candidates for the APPA 2010 - 2011 year. The rest of the Nominating Committee consists of the Senior Representatives

of the APPA Regions. I trust that everyone is pleased with the results of the committee's work. Please allow me to thank the senior regional representatives for the timeliness and thoroughness with which they carried out their Nominating Committee responsibilities.

It has been my honor to continue serving APPA this year as your Immediate Past President. I now conclude my tenure of serving APPA on the Board for six of the last seven years. ■

P R E S I D E N T - E L E C T

Let me begin by saying how honored I am to serve as APPA's President-Elect. I found out how well the APPA leadership system works by having a chance to learn first hand from great people like APPA Presidents, Polly Pinney and Bill Elvey. The year of orientation has allowed me to hit the ground running when I took office in July.

The past year has been both exciting and challenging. During September 2009, I had the opportunity along with my wife Jane to represent APPA in the countries of Singapore, Australia, and New Zealand, while attending the 2009 Tertiary Education Management Conference (TEMC09) in Darwin, Australia. Before attending this conference I gave a presentation to the APPA Singapore Chapter hosted by the National University of Singapore. The title of the presentation was "Integration of Sustainability and Energy Efficiency in Facilities." At the TEM Conference I gave a presentation to the TEFMA Board and offered a presentation to conference attendees on the topic of "Key Issues for Facility Professionals." I was also able to take extensive tours of several colleges and universities in all three countries. I sincerely appreciate the opportunity to represent APPA on this international tour as it was rich both culturally and educationally. Jane and I developed many lasting friendships and professional relationships with educational facility professionals from Singapore, Australia, and New Zealand while supporting APPA's Vision, "To become a Global Partner in Learning" as well as its Mission, "To support educational excellence with quality leadership and professional management through education, research, and recognition."

It is my resolved belief that it is essential to APPA's strategic plan to continue to reach out to our global educational facility management community. And, it is my hope that a good number of the things accomplished last September will place APPA and its international partners in a better position financially, while providing greater educational, networking, and professional development opportunities for its members.

When I developed my platform for the position of APPA President-Elect, my commitment to you as APPA members was to serve APPA with the following objectives:

- Provide continuing support for the development of the APPA 7 Key Strategies as they are the foundation of our transition and growth.
- Promote alignment with international, regional, state, and local chapter organizations as vital to APPA's role as a leader in the facility management arena.
- Expand the availability of programs that engage young facility management professionals.
- Survey the membership to determine the areas of greatest needs and the type of program delivery needed.
- Evaluate the content and delivery of existing programs to ensure they are affordable, accessible, and focused on current issues, while making appropriate use of innovative delivery technologies.
- Develop new and innovative training and workshops that can be delivered at the regional, state, and local chapters.



By Darrel W. Meyer

Many of these objectives are being addressed thanks to the leadership of President Polly Pinney. In February of this year the APPA Board reviewed an implementation strategy necessary to successfully achieve the following four major objectives:

- **To increase membership** particularly in underserved areas such as Community Colleges; K-12 schools, and HBCUs and to arrest renewal losses stemming from the global economic crisis.
- **Identify new revenue sources and implement new business plan approaches** in the delivery of our present high-quality programs, publications, and services.
- To expand the reach of APPA's services by **redefining the organization's marketing approach.**
- **To enhance opportunities for strategic alliances,** thereby increasing APPA's visibility and influence within the educational community.

Over the past few months – under Polly's guidance, hard work from the committees and help from an incredible APPA staff – these implementation strategies along with an integrated marketing plan are being finalized to guide the APPA over the next few years.

During the past year many people have inquired about the theme for the APPA presidency for the year 2010-2011. After a year with Polly Pinney's theme of Honing the Brilliance, it seems appropriate to concentrate on Investing in Your Future for the upcoming year. APPA's greatest resource is its diverse membership and the vast amount of knowledge associated with them. It is an organization that exists for its membership and as such should strive to provide the resources for members to identify and take full advantage of their potential as facilities professionals.

As APPA President I plan to focus on the critical challenge of the economic crisis that facility professionals are facing today, and promote the need to expand the availability of programs that would engage young facility management professionals, create programs that encourage synergy among the international, regional, state and local chapters, and develop a strong membership recruitment initiative. Already an APPA Regional Relationship Task Force has been formed that will define and identify joint international APPA-regional association goals with regard to mission and roles, program content and delivery, and overall leadership development. Another initiative that has already begun is a group that will strive to increase membership in underserved areas such as community colleges, small colleges, K-12 schools and HBCUs and look at ways that APPA can better engage these institutions.

It is more important than ever for APPA to be resolute and continue to develop programs based on its strategic plan in these uncertain economic times. Facility professionals need to provide new and effective leadership now more than ever. The broad impact of facilities on an educational institution's success provides an unprecedented opportunity for facility professionals, and also a new skill set of opportunities. APPA must take the leadership role in identifying the most critical facility issues and quickly respond with focused and targeted initiatives that will provide members with the resources they need and demand.

Finally, I look forward to serving as your APPA President during this next year of Investing in Your Future. This is a favorite quote of mine from a Hallmark book called *No Limits But the Sky*:

*Climb high, climb far, your goal the sky,
your aim the star.*

*Perseverance is the investment.
Success is the return. ■*

“... it is essential to APPA's strategic plan to continue to reach out to our global educational facility management community.”

The global economic downturn continues to negatively impact APPA's financial situation. Indeed, in the fiscal year ending March 31, 2010 we posted a deficit of \$368,066 in the operation (exclusive of the appreciable gains in the long-term equity investment up by \$112,687). We experienced a reasonable number of registrants for our face-to-face educational programs given the economy's impact on educational institutions' budgets. Revenue and expense shortfalls from the APPA 2009 conference, publications, and job advertising sales also contributed to this deficit. The regions' decision to fund the committee and Board of Directors meetings was significant and did not go unnoticed as we collaborate together to weather this economic storm. In addition, we are continuing to refocus and recalibrate all professional development programs and their delivery for this fiscal year (2010-2011) to achieve a balanced budget.

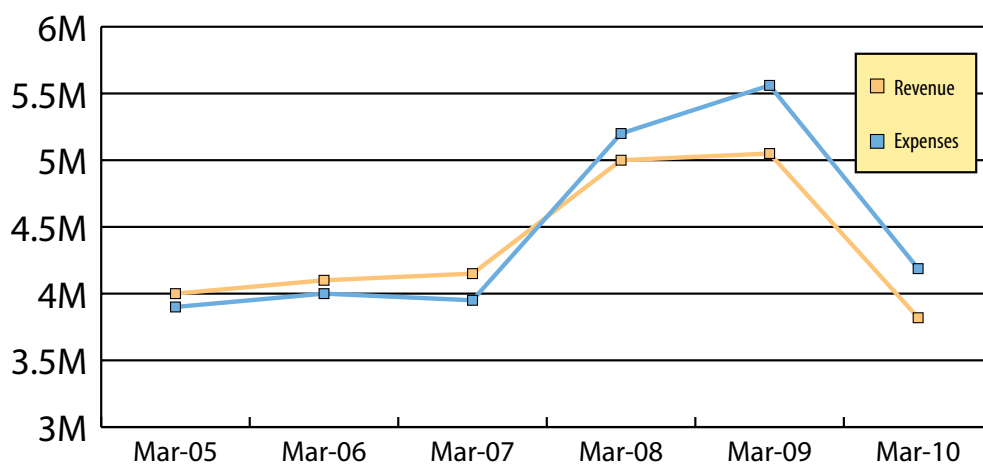
As expected, over half of our reserves have been used for this "rainy day" situation resulting in reserves presently totaling \$345,000. Our equity investment recovered significantly from the prior year's stock market crash. Adjustments in income streams and expenditures have been made to balance such losses in the coming year. The APPA headquarters building was assessed at approximately \$2.1 million in February 2010 by the City of Alexandria, and the building is fully paid.



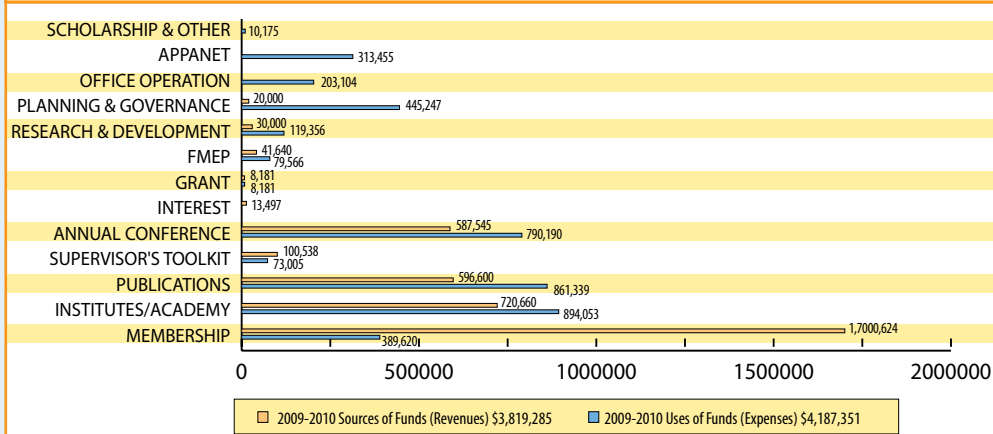
By Nancy Hurt

Graph 1 shows the six-year history of revenues and expenses for APPA. Graph 2 shows the year's revenues and expenses by activity category. Membership expenses reflect the direct cost of membership department salaries and 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 also support production of *Facilities Manager*

Graph 1: APPA's History of Revenue & Expenses



Graph 2: Sources of Funds (Revenues) & Uses of Funds (Expenses) FY 4/1/2009-3/31/2010



“ APPA welcomed more than 20 new institutional and affiliate members during the 2009-10 membership year. ”

magazine and the direct cost of many APPA activities such as the website and database management; and a portion of research and development, 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.

Given stock market conditions and the global economy, APPA's long-term equity investments spiked reflecting a gain of \$112,687 during the past year. Fluctuations in the magnitude of returns from year to year are expected to occur, however, given the present state of the economy, the Board has decided to reassess our investment policy to stabilize such fluctuations and their resultant impact on our financial situation and cash flows.

We are all experiencing tough economic times, and the APPA organization is no different. Nonetheless, the Board and the APPA staff remain committed to arresting this negative financial swing and getting our finances back on a positive track during the coming year.

Membership Committee

As we all prepare for the busy new academic year at our institutions, it is an excellent time to recognize the dedication and hard work of everyone involved in membership activities this year, including individual members, the Board, Membership Committee Representatives, and the APPA staff.

APPA, like many of our institutions, has faced the challenges and opportunities presented by the economy. This year we experienced significant loss in the number of institutional and business partner members. Anecdotal information indicates the economy played a large part in this loss. Staff, international and regional committee members, international and regional board members, as well as consultants, all pitched in as a combined group making hundreds of contacts via phone and e-mail in order to ensure as many membership renewals as possible.

Even with the downturn in the economy, economy and the challenges of membership renewal, APPA welcomed more than 20 new institutional and affiliate members during the 2009-10 membership year. Many of these new members cited access to APPA programs, such as

Professional Development, FPI, and Certification as reasons for joining.

The Membership Committee is working on new recruitment initiatives focusing on membership benefits. We continue to brainstorm ways to enhance our membership categories to ensure inclusion and engagement of the full spectrum of educational facilities professionals. We remain steadfastly behind the vision that APPA International and its regions are a resource and community in both good times and bad.

Success in the membership area is not possible without the dedication and hard work of all of us: members, staff, and Board members. I extend my sincerest appreciation to all who contributed the all of the recruitment and retention efforts this year.

Bylaws Committee

This last year, the Bylaws Committee recommended a number of Bylaws changes to the APPA Board of Directors, which were passed at the February 6, 2010 Board Meeting. The Bylaws changes passed by the Board include:

- Language changes to provide consistency in terminology throughout the Bylaws.
- Modification of the Affiliate Member description to make the membership organization based.
- Clarification language in the International Member description to make it clear when and how an International Member may associate with an existing region.
- Removal of the requirement for Educational Institution Associate members to be full-time employees.
- Clarifications to the appointment of at-large members to the Board to make the Bylaws consistent with practice.
- Additional language to provide for installation of association officers in the event an annual meeting is not held.

Thank you to the entire Board, including the incoming regional representatives, for their thoughts, insights, and perspectives as we worked on these changes.

In closing, I would like to applaud the hard work of the APPA staff this last year. As always they provide exceptional support for our organization. We are fortunate to have these dedicated individuals as a part of our team. ■



VICE PRESIDENT FOR INFORMATION AND RESEARCH

There have been significant accomplishments by the Information and Research Committee and APPA staff during the past year despite the challenges posed by the economic downturn. Although we were obligated to scale back or shelve some initiatives because of limited resources, we were also forced to critically appraise many of our services, programs, and offerings. This allowed for an opportunity to reflect on how these services, programs, and offerings are marketed, delivered, and utilized by members.

FPI Survey/Report

First of all, we offer a big thank you to all of the institutions who participated in the Facilities Performance Indicators survey this year. Granted, for those who participate for the first time, it can be a somewhat daunting task, but it becomes much easier in subsequent years. The benefits of participating are numerous: helping you to make the business case for your facilities needs, compare and contrast your facilities operations with other institutions, and create a balanced performance scorecard based on critical data findings.

In the past years, there has been a modest increase in participation in the survey, but during this survey cycle, we needed to temper our euphoria, as participation almost doubled (actually increased by 74 percent from 225 to 392). We do not anticipate losing traction because both the survey and the report continue to improve. These are a few of the 2008-2009 report enhancements: (1) APPA released the unpublished Report as a beta version for all participants to view and verify accuracy of the submitted data, (2) Trending on all charts and graphs have been extended from three to five years, (3) The restriction of selecting only three institutions to compare data has been lifted to allow viewing up to 100 participants, and (4) The Executive Level Presentation has more functionality this year. The charts can be exported into Excel, PowerPoint, or Word programs.

BOK, CFaR Projects, and Books

BOK

APPA's Body of Knowledge is now available in a searchable, digital database. It updates and builds upon the contents of *Facilities Management: A Manual for Plant Administration*. Editor-in-Chief Maggie Kinnaman led an Editorial Board in this latest revision. Many BOK chapters have been added or updated since it was launched in November 2009. Currently, there are 56+

chapters in the BOK with nearly 200 subscriptions sold to date. The Editorial Board plans to do annual chapter reviews starting in 2011.

Center for Facilities Research

The CFaR projects recently completed are: (1) Development and Application of Policy Based Tools for Institutional Green Buildings by Tony Cupido (McMaster University), and (2) National Campus Safety and Security Project – Findings and Contributions by Bill Elvey (University of Texas, Dallas). Projects currently in process are: (3) Relating Performance Indicators with Sustainability by Greg Adams (University System of Georgia), (4) Managing Key Human Resource Issues: A Study of Educational Facilities Professionals in Institutions of Higher Education by Shelley Price-Finn (Saint Mary's University), and (5) Implementing Total Cost of Ownership by Doug Christensen (Brigham Young University).

Books

Publication sales are going well with the newly published *Strategic Capital Development* by Harvey Kaiser and Eva Klein (also a CFR project). Updates and revisions are planned for the Staffing Guidelines Trilogy (grounds, custodial, and maintenance) led by Editor-in-Chief Alan Bigger.

Marketing/Communications

Norm Young is chairing a subcommittee on Marketing/Communications that is exploring additional options to market APPA's programs, services, and offerings. The M/C Subcommittee will focus on effective strategies for marketing FMEP, BOK, and APPA 20xx. The initial focus of this group is on the FMEP: (1) To make recommendations for improving the program, (2) To highlight the ROI generated from participating in the program; (3) To identify problems that FMEP can solve. The subcommittee will then engage in a similar exercise for the BOK and APPA 20xx.

A special note of thanks is to be given to the Information and Research Committee, APPA staff, and the business partners supporting the committee: Norm Young, ERAPPA; Mike Sherrell, SRAPPA; Jeri Ripley King, MAPPA; Greg Wiens, RMA; Jeff Brown, CAPPA; Richard Storlie, PCAPPA; Maggie Kinnaman, At-Large; Darryl Boyce, At-Large; and Steve Glazner, APPA staff liaison. A special expression of gratitude to APPA staff supporting the L&R Committee: Christina Hills and Anita Dosik. ■



By Randolph Hare

“These times call for effective leadership that is innovative while still being practical.”



VICE PRESIDENT FOR PROFESSIONAL AFFAIRS



By David A. Cain

This was an exciting and busy first year as Vice President for Professional Affairs. The hand-off from Kevin Folsom, previous Vice President, was seamless and more than I could ask for. He continues today to support both me as a mentor and continues to chair the Code Advocacy Task Force. It has been my privilege and honor to serve and work with the four main committee groups, the Professional Affairs Committee; Awards and Recognition; Code Advocacy Task Force; and liaison to the Certification Board.

While I had been a working member of the Professional Affairs Committee for several years, I was unable to appreciate the amount of work that the leadership position required. Therefore I am absolutely grateful for skillful guidance from John Bernhards, APPA's associate vice president and the liaison to Professional Affairs. The support received from John and the APPA staff has been outstanding and more than I could have wished for.

I would also like to acknowledge the committee membership; listed below are the individuals that represent the different regions within Professional Affairs. These individuals deserve our praise for their loyalty and dedication to APPA in delivering these awards. I can't thank these facilities professionals enough for all their effort and hard work this past year! Kudos and job well done to the committee members below.

Professional Affairs Committee

CAPPA:	David Gronquist
ERAPPA:	Willy Suter
MAPPA:	Greg Fichter
PCAPPA:	Tony Ichsán
RMA:	Jeff Butler
SRAPPA:	Jodie G. Sweat

Awards and Recognition Committee

CAPPA:	Art Jones
ERAPPA:	Joseph Rubertone
MAPPA:	Jerry Carlson
PCAPPA:	Anthony Guerrero
RMA:	Christopher M. Kopach
SRAPPA:	Dan Batson

Code Advocacy Task Force

Chair:	Kevin Folsom
	Mike Anthony
	Brooks H. Baker
	Richard Davis
	David Handwork
	Terri Konchesky

Professional Affairs Committee: Effective and Innovative Practices/ Award for Excellence Awards

Among the core responsibilities of the Professional Affairs Committee is the review of nominations and selection of institutions receiving the APPA Effective and Innovative Practices Award (E&I), and the Award for Excellence in Facilities Management (AFE). This year 25 submissions from 19 institutions were received, with five E&I awards presented. Five AFE applications were received, with two institutions receiving APPA's highest acclaimed award.

1. California State University Northridge (Student Design Team Program)
2. Purdue University (Building Services Sustainability Program)
3. University of Iowa (University of Iowa Energy Hawks)
4. University of North Carolina, Charlotte (Take It or Leave It Tour/Recycling Program)
5. University of Southern California (Maintenance Parts and Materials Process Reengineering)

Please congratulate the institutions that were recommended to the APPA Board for the Award for Excellence:

Arkansas State University (ASU)
University of Nevada/Las Vegas (UNLV)

Awards and Recognition Committee

The Awards and Recognition Committee (A&R) is responsible for reviewing and approving individual nominations for the Pacesetter Award; the Meritorious Service Award, and the APPA Fellow designation. There were three Meritorious Service Award submissions, eight Pacesetter Award submissions, and two Fellow awards submissions. Please congratulate the following individuals – all of whom are well deserving of these prestigious awards:

APPA Fellow

Maggie Kinnaman, Emeritus Member, formerly of the University of Maryland, Baltimore
Dr. Mo Qayoumi, California State University-East Bay

2010 Meritorious Service Award

Kevin Folsom, Dallas Theological Seminary
Mary Vosevich, University of New Mexico
Norman Young, University of Hartford

Pacesetter Award

Ben Elisondo, Skirball Cultural Center
Daniel Gearan, University of Southern Maine
Kristie Kowall, Illinois State University
Viron Lynch, Weber State University
Juan Ontiveros, University of Texas/Austin
Matt Taylor, University of North Florida

Code Advocacy Task Force

The charge of the Code Advocacy Task Force is to keep the APPA membership informed of upcoming code issues and serve as a liaison to APPA of all code and regulations that impact educational institutions. Under the advisory leadership of Kevin Folsom the task force reviewed proposals and contributions submitted by members of the task force to the National Fire Protection Association's standards committee and supported the following alterations to existing NFPA codes, resulting in potentially lower costs for educational institutions:

NFPA 72 (Fire Alarm Code)
NFPA 25 ("Sprinkler System Code")
NFPA 20 ("Fire Pump Code")
NFPA 70 ("2011 National Electrical Code")
NFPA 1 ("Fire Code"/Emergency Power Systems)

Certification Board Liaison

As the Vice President for Professional Affairs I also serve as the elected officer liaison to the Certification Board. In this capacity, I am able to collaborate with the board members to ensure their activities align with the continued overall goals and mission of APPA. The leadership of the Certification Board, under the current direction of Jack Colby, continues to ensure this critical effort reaches the facilities professional aspiring to advance in their career. The APPA staff, with the support of the Certification Board, is fully committed to the continuing growth of the Educational Facilities Professional (EFP) and Certified Educational Facilities Professional (CEFP) into our educational environments. ■

VICE PRESIDENT FOR PROFESSIONAL DEVELOPMENT

Higher education facilities professionals are now thoroughly entrenched in the new economic realities of their institutions. For most, there is a continuous call to do more with less in some mixture of meeting the existing expectations for the current facilities and infrastructure; planning for and constructing new facilities; increasing regulatory and compliance activities, etc., while also dealing with reductions in operating and capital budgets. The situations are often compounded by administrative challenges such as staff reductions (voluntary and/or involuntary) and workforce demographics.

While every institution seems to be dealing with many of the same issues, no two seem to be exactly alike. They each have different DNA coupled with a different combination of needs, constraints, and opportunities. APPA maintains its mission-oriented belief that professional development for the facilities professional is essential – especially when it is on target and timely.

These times call for effective leadership that is innovative while still being practical. APPA's Professional Development Continuum is designed to assist its member institutions in addressing their needs by providing useful information,

defining a roadmap for success, and imparting the principles and skills required to be the effective leader. This process is supported greatly by the benefits that come with the many formal and informal networking opportunities with other member institutions.

APPA has a proven track record of great programs that support the training and development needs for each level of a facilities professional's career. This includes offerings to improve both the technical skills and the people skills required to be effective. The quality of this past year's programs was no exception. The Institute for Facilities Management and Supervisor's Toolkit are highly rated and continue to be in high demand. In addition, the Leadership Academy, the Thought Leaders Series, and the SFO Summit received excellent evaluations from the attendees and beneficiaries. The Professional Development Committee works with the appropriate people within each program to review and assess the value delivered to the members and participants.

APPA wants to complete the educational experience by enhancing the programs and continuing to seek out the best thinkers and best practices from all business areas and industries, refine the best ideas, and incorporate them into



By David Gray



its program offerings. The Annual Conference is a great example of such an opportunity. There are opportunities to employ technologies (such as Web casts/webinars, etc.) that could prove to be attractive to younger professionals, be cost-effective for all, and are seen as a high priority for APPA in the coming year. APPA's new certification programs are becoming an item that many individuals are pursuing.

The APPA membership is diverse and we understand the importance of alignment with our regions and chapters. The programs that each of these regions/chapters can offer will allow for the ongoing success of the overall Professional Development Continuum. APPA will continue to leverage the work of the regions/chapters to provide a continued balance of offerings from the entry level professional to the Senior Facilities Officers of our organization.

The Professional Development Committee is made up of a great group of individuals who are hard-working and engaged. I wish to express my thanks to the following:

Professional Development Committee: Doug Greenwood (MAPPA), Dana Peterson (ERAPPA), Doug Riat (CAPP), Shawna Rowley (RMA), Kathleen Scheduler (PCAPPA), Tony Yamada (SRAPPA)

Institute Subcommittee: Jay Klingel, Subcommittee Chair, Lynne Finn, Don Guckert, Mary Vosevich

Academy Subcommittee: Doug Christensen, Subcommittee Chair, Matt Adams, James Cole, Jack Hug, Ann Jenkins, David Judge, Gary Reynolds, Lander Medlin, Glenn Smith, Tom Stepnowski

APPA 2010 Subcommittee: Doug Riat, Chair, Polly Pinney, President, Bill Elvey, Immediate Past President, Darrel Meyer, President-Elect, Dave Button, Randy Ledbetter, Keith Woodward, Randolph Hare, Neal Lespasio, Welcome Committee Host

Certification Board: Jack Colby, Chair, Erin Babson, David Cain, Phil Cox, Jim Roberts, Jim Whittaker

Thought Leaders Chair: Jack Colby

I also want to thank the APPA staff for its support and especially Suzanne Healy, director of professional development, and Katherine Theranger, professional development and certification manager. Finally, I want to recognize Glenn Smith as he assumes the responsibilities as Vice President for Professional Development. He is a proven professional bringing excellent qualifications and experience to the position, and I know he will serve APPA and its members well. ■

EXECUTIVE VICE PRESIDENT'S REPORT

These remain uncertain economic times for all sectors of the economy let alone education – locally, nationally, and globally. Although public perception of the value of a college education remains strong, it too is under attack. All told, the global economic downturn has eclipsed all other factors contributing more significantly than ever to the funding challenges we all face at our institutions.

APPA is no different. Certainly, the impact of these economic challenges on your budgets and your ability to travel remains severe and beyond anything we could have imagined. For example, participation in educational programs remains down by 40 to 50 percent, as is the case for other association colleagues across the industry. Even our diverse portfolio of programs, products, and services cannot make up the difference, at least

not financially thus far. This situation necessitated a reduction in our workforce similar to what many of you have or are experiencing. Therefore, we will post another sizeable year-end deficit of \$357,000. Revenue and expense shortfalls continued with the APPA 2009 conference in Vancouver, losses in institutional membership, the natural resultant drop in member attendance at various educational venues, and the negative impact of hotel contracts signed and sealed years ago. Although cash outlays for the development and execution of the certification program were significant, development of both credentials is complete and we are slowly seeing a return on our investment. Early completion of the 7 Key Strategies was critical in setting us up with a focus on the future with products and services you need now. Our operating reserves remains at \$245,000 went to service this untimely "rainy day" situation



By E. Lander Medlin

experienced during the past couple of years. On a brighter note, we do own our headquarters building outright valued at \$2.1 million.

We are all (volunteers and staff) working tirelessly to meet these challenges head on. Fortunately, engagement in the work of improving the profession remains high and productive. This is a measure of the commitment to the profession by so many of you and your colleagues. We are blessed to have such support at this time. As such, APPA remains the “association of choice” supporting educational facilities professionals with a myriad of professional career development and leadership growth opportunities that are positioning us and YOU for the future.

The clarity of focus and direction from completion of the strategic plan’s 7 Key Strategies has sharpened and crystallized ways to increase value to our members that are both tangible and intangible. Our programs, products, and services have been transformed into a professional development career continuum that is unparalleled in the industry. Our role to elevate educational facilities professionals into influential leaders in education is taking shape. Further, execution of the 7 Key Strategies is critical to delivering the desired outcomes of competency, collaboration, and credibility for our members. These desired outcomes – the 3 Cs – remain a consistent key message and 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. Most notable is the launch of the digital BOK (Body of Knowledge) updating and replacing the *Facilities Management: A Manual for Plant Administration*. There are 56+ chapters available at a small institutional-based subscription rate of \$199. This gives any and all individuals at your institution full access (24/7) to this wealth of information. In addition, your resource library should include the Web-based 2008-09 Facilities Performance Indicators (FPI) and dashboards and our newest books *Strategic Capital Investment*, *The Green Campus*, and the significantly revised edition of the *Environmental Compliance Assistance Guide* (published in collaboration with the Campus Safety Health and Environmental Management Association-CSHEMA) along with *Buildings... The Gifts That Keep On Taking: A Framework for Integrated Decision-Making Leadership in Educational*

Facilities Administration, and *Stewardship & Accountability in Campus Planning, Design & Construction*. Further, it is noteworthy that our FPI data, ratios, and benchmarks are being used more widely than ever before. Several large higher education systems and associations like CAUBO have established cohort groups and are taking advantage of APPA’s FPI tools and training to make their data collection and benchmarking efforts extremely meaningful and valuable. Our international strategic alliance partners continue work on an international benchmarking project. Don’t hesitate to contact us for more information on this invaluable resource. And, did I mention, these tools and reports are available free to member institutions who participate in the data collection survey phase. An incredibly valuable member benefit!

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 APPAinfo list that boasts over 1,050 subscribers. Our latest version of the APPA website represents our updated, transformational brand identity. The site is indeed becoming the “go to” resource for educational facilities questions worldwide.

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. Over two dozen research projects have been completed to date.

Finally, as part of our strategy to expand knowledge and research, APPA, with sponsorship from Haley & Aldrich, delivered its fourth annual Thought Leaders Symposium (TLS) for 2009 and, the fifth was delivered this past April 2010 through the generous support of UGL Unicco. In essence, a group of key higher education stakeholders consisting of chancellors, presidents, regents, business officers, facilities professionals, and representatives from the business community are assembled annually and engage in a day-long discussion of several drivers of change expected to shape the future of higher education and their impact on facilities. The specific trends in higher

“The clarity of focus and direction from completion of the strategic plan’s 7 Key Strategies has sharpened and crystallized ways to increase value to our members...”

education and the top ten critical facilities issues for fiscal years 2006, 2007, 2008, and 2009 are published as monographs and have been disseminated to facilities professionals and senior institutional officers. The fourth (2009) Thought Leaders Symposium, focused on the criticality of energy and sustainability in higher education, and the impact of the economy on both these major trends. Visit our website for your free PDF downloadable copy.

It is just this type of research that will brand APPA as the "go to" resource for educational facilities questions. And, it is through these research findings and thought-provoking symposia that we will increase the awareness of the facilities profession with senior institutional officers and enhance the credibility of the educational facilities professional.

The content and appeal of APPA's vast array of educational programs (Institute for Facilities Management, Leadership Academy, and the Supervisor's Toolkit) provide members with the professional career development 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, look for the CEUs and PDHs available for many of the courses offered at these educational programs. In addition, we have established a catalog of webinars and podcasts being regularly delivered to continue support of your professional development needs even though you cannot travel. Take advantage of these opportunities as they are available. If the timing is inconvenient, we have conveniently archived each of them for access at your time and place of choice. If you are a business partner, take advantage of the opportunity to sponsor one of these virtual deliveries. The visibility and exposure is unbeatable.

Of particular note is the complete reformulation of APPA's annual conference (now simply called "APPA 20xx"). We have featured best-of-breed panelists and speakers who will focus on the future solutions to our most pressing issues. The enhanced framework consists of several general plenary panel sessions, followed by breakout sessions designed to provide practical tools and technologies for current and future projects, to bolster your skills, and to prepare your organization for the next generation of facilities management practices. This approach strengthens this offering in a number of ways and

ensures differentiation from regional and state or chapter meetings. Also, we are again delivering a distinct and successful program strictly for senior facilities officers called the Senior Facility Officers Summit. These two educational programs along with our Institute for Facilities Management (offered twice yearly in September and January), the Leadership Academy (offered as a separate delivery next April and as a co-locate with the Institutes this coming fiscal year), and Supervisor's Toolkit (offered at your time and place of choice) will continue to serve the continuing professional development needs of supervisors, mid-level managers, directors, and senior facilities officers. These activities are considered essential by the volunteer leadership to provide for a continuum of professional development career opportunities for the educational facilities professional.

To add to this continuum of professional development career opportunities and to complement our competency-based programs and services, APPA has developed and executed a certification program comprising two credentials. The first credential is a knowledge-based credential called the EFP (Educational Facilities Professional) targeted to the younger, less experienced educational facilities professional. A preparatory course is now delivered regularly and in conjunction with our major educational offerings, at the regional conferences, and local areas for a number of institutions. As a result, close to 150 individuals have now achieved the status of EFP. The second credential is a full certification for the more experienced educational facilities professional (CEFP – Certified Educational Facilities Professional) incorporating both the body of knowledge of educational facilities management and successful demonstration that knowledge has been applied at the institutional level. Over two dozen individuals have received the CEFP designation. Both these credentials are essential for the future engagement of our young facilities professionals in APPA and the educational workplace and to increase the credibility of the facilities profession at educational institutions. You can take the preparatory course through an online webinar delivery and sit for the exam right at your institution. For more information visit the certification section of the APPA website today.

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. APPA's

“... provide members with the professional career development and personal growth needed to compete and collaborate effectively in today's environment.”



work with NACUBO, SCUP, and the EPA through the Smart & Sustainable Campuses Conference and HEASC (Higher Education Associations Sustainability Consortium) are expanding the collective knowledge and network for institutional sustainability programs. The joint ACUHO-I/ APPA Facilities Conference remains a successful program offering for both the campus housing and facilities professional. This program is offered annually each fall. The Women's Leadership Institute is offered collaboratively each December by a dozen higher education associations. In addition, we have targeted K-12 schools through the Virginia Schools Plant Management Association (VSPMA) for delivery of the FPI, Toolkit, and our certification program. Our institutional efforts remain strong through our institutional strategic alliance agreements.

Thanks to the funding received from ASHRAE we have launched a huge research project focused on the Total Cost of Ownership (TCO) which will engage members, organizations, and associations across the entire field of facilities management. 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. Visit our website for more details about our combined offerings to take advantage of these relationships.

Credibility

Environmental issues and compliance concerns remain an important part of our public policy agenda. We have just begun work with the Department of Energy (DOE) to help establish a College & University Energy Alliance to improve energy efficiency that is also environmentally responsible. Visit our website for updates on progress and utilize the associated Web-based education compliance assistance center for your information needs (www.educationcompliance.org).

The explosion of regulatory issues and code compliance drove the establishment of a Code Advocacy Task Force (CATF) by the APPA Board. The task force is presently aligned under the duties and responsibilities of the Vice President for Professional Affairs. CATF established a "standards portal" for our members available via the APPA website. The group has already successfully advocated a variety of positions with

the NFPA, NEC, and ASHRAE thereby avoiding additional costs and/or saving educational institutions thousands and thousands of dollars. Look for more information on these important developments during the coming year through the APPA website and in the Code Talkers column of *Facilities Manager* magazine.

The clarity of APPA's brand purpose "to transform the educational facilities professional into influential leaders who, in turn, create supportive and inviting learning environments" is integral to all we do. And, APPA's role in increasing the awareness of the facilities profession with senior institutional officers will remain a strategic driving force on behalf of the education facilities profession. Our brand identity in education is reflective of this purpose and role and its on-going attainment. Our commitment to programs, products, and services that improve the facilities professional's competency remains unparalleled in the field of educational facilities. By coupling this increased competency with our collaborative strengths, the credibility of our members and the profession is further enhanced.

APPA's competitive advantage in this rapidly changing and challenging world stems from your active engagement across our professional development career continuum where you will find programs, products, and services of great value as you wisely choose membership in this association. 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, the training and development of your organization's staff, and for continuous institutional improvement. We appreciate the value you place on your membership in APPA.

Through the vast array of educational offerings, print and electronic information, research, and publications, and this rich network of professionals, APPA can help you gain that competitive edge and enhance your professional image.

Certainly, the continued challenges we face as an association, as educational facilities professionals, and as an industry sector 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. ■

“ Our commitment to programs, products, and services that improve the facilities professional's competency remains unparalleled...”



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