

We are APPA

By E. Lander Medlin

International APPA and its six regional organizations have been engaged in a substantive dialogue around the roles, goals, and mission of each organization which will ultimately achieve greater alignment and synergy.

In the spring of 2010, APPA and our regional associations agreed to jointly convene a task force to define and identify joint international APPA-regional association goals, with regard to mission and roles, program content and delivery, and overall leadership development. In addition, APPA's changing role in higher education (as well as to a lesser degree with K-12 schools) and the expanded role of the senior facilities management professional (SFO) begged the question of how to specifically deal with the emerging role of the SFO. This was particularly the case with regard to program and mission focus whereby the needs of other important—yet different—constituency groups (e.g., specific program area directors, mid-level managers, and supervisors, etc.) must be met. Certainly engagement is key at all levels—but we realize that the dilemma is how to do this effectively, across the entire delivery system.

Among the compelling questions that the task force was asked to study were: Who does each organization serve? What are their needs? And how should each fulfill those needs? It was clear that we needed the task force to review the current situation, investigate overlaps and duplication of services, and make recommendations that would serve to increase engagement and participation across the entire association network.

THE CHARGE

To develop its recommendations, the task force utilized past and new member survey data, performed a comprehensive SWOT analysis at all levels in the organization, evaluated existing programs, and freely exchanged ideas. The summary charge of the task force was both comprehensive and complex, consisting of the following:

- Determine individual member needs (chapter, regional, and international) and who consistently provides for those needs at the present time.
- Identify areas of overlap in meeting various members/constituent groups' needs.
- Develop SWOT analysis of current situation.
- Investigate current best practices of engagement and participation.
- Define/re-define roles of international APPA, regions, chapters, and their requirements to avoid competition and/or duplication of services.
- Explore alternative delivery models to meet member needs.
- Determine feasibility of offering one membership package.

The complexity of the charge generated numerous questions and challenges. However, broad-based constituency input from the regional boards' SWOT analyses and a member-based survey generated the following critical few elements for all levels in the organization to address:

- Engagement
- Alignment
- Roles & Services

- Competition (& Duplication)
- Communications (& Marketing)

The APPA Board recognized the importance of each of the elements and included them specifically in APPA's new strategic plan (launched in July, 2011).

FINDINGS AND RECOMMENDATIONS

Although the task force noted overlaps, they came to the realization that the focus and potential target audience was slightly different at each level of the organization. For example, APPA provides members the structural “gateway” to a plethora of resources, research, recognition, and outreach on a global scale. The regions represent the delivery “network” for relationship-building, networking and mentoring, and educational opportunities. And, the chapters provide front-line supervisors and managers with “geographic proximity” to basic training/workshops, information-sharing and social networking, and individual mentoring.

The task force provided a number of recommendations such as:

- Provide centralized website management.
- Develop broad-based communications and marketing plans.
- Recognize the emerging theme of “We are APPA.”
- Study feasibility of regions utilizing APPA's conference registration ‘app’ (database/ system.)
- Establish a guideline roles and responsibilities “matrix” for inclusion in membership materials and communications.
- Provide briefing at fall 2011 regional meetings.
- Consider the feasibility of an integrated/ exclusive membership (i.e., APPA membership affords the institution regional and/or state membership and vice versa.)

FURTHER STUDY

Although many of the recommendations are being implemented or explored at this time, the complexity of the task requires further work. Therefore, the APPA Board approved formation of a newly constituted task force in September, 2011 to further study the implementation of the recommendations from the final report. Particular emphasis by this new task force is focused on the few items noted in the re-constituted charge below:

- Review the recommendations as presented and determine additional actions(s) required for implementation.
- Consider the feasibility of an integrated membership.
- Define the roles and responsibilities of a 'matrix' in "actionable" terms.
- Relate the various activities and services of international APPA, regions, and chapters.

The goals are:

- Promote/create synergy between international APPA, the regions, and chapters.
- Keep APPA and its regions/chapters as the "associations of choice" for all educational facilities professionals.
- Discuss structure that encourages participation and provides support for all membership categories.
- Maintain and further enhance opportunities for relationships with business partners.
- Align the regional leadership and international APPA activities to promote leadership, succession planning, and the value of ongoing efforts of the APPA staff and volunteer leaders.

ACTION PLAN

The APPA Board has asked the new task force to provide a final report and action plan to the executive committee/ board of directors by July 2012 which is to include:

- "Actionable" guidelines for roles and responsibilities for international APPA, the regions, and chapters

- A statement of impacts to international APPA, the regions and chapters' membership dues (including business partners and other stakeholders as appropriate)
- An implementation plan.

The challenge will be to get it right, and ensure we have concurrence and collaboration at every level in the association network. ☎

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