



# Achieving Synergy Through the APPA/Regional Relationship Task Force

By E. Lander Medlin

**D**uring the spring of 2010, the International APPA Board of Directors and the regional associations of APPA agreed to jointly convene a task force. This task force would define and identify joint International APPA-regional association goals with regard to mission and roles; program content and delivery; and overall leadership development. 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 presently satisfies those needs
- 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/redefine 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:

- Engagement
- Alignment
- Roles & Services

- Competition (and duplication)
- Communications (and marketing)

We recognized that these critical few elements will require an intense focus of time and effort by all concerned. The APPA Board of Directors recognized the importance of each of the elements and included them specifically in APPA's new strategic plan.

## PHASE 1

The task force (Phase 1) produced the following recommendations:

- 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 for a roles and responsibilities "matrix."
- Include the matrix in membership packets.
- Provide briefing at Fall 2011 regional conferences.
- Consider the feasibility of an integrated/exclusive membership (i.e., APPA membership affords the institution regional and/or state membership and vice versa.)

Although many of these recommendations are already being implemented, it was clear to the APPA Board that even further work needed to be done to formally address implementation of

the recommendations in more specific, actionable terms.

## PHASE 2

Therefore, a newly formed task force (Phase 2) was established to provide a detailed implementation/action plan for the recommendations from Phase 1 of the task force's final report (delivered to the Board on July 14, 2011). The particular emphasis of this task force (Phase 2) is noted in the following charges:

Review the recommendations as presented and determine additional actions(s) required for implementation.

- Consider the feasibility of an integrated membership.
- Better define the roles and responsibilities 'matrix' in "actionable" terms.
- Relate the various activities and services of International APPA, regions, and chapters to the APPA Journey (i.e., the various pathways individuals take as they grow and develop in the profession by virtue of their engagement in International APPA, the regions, and chapters). The goals remained similar noted as follows:
  - Promote/ create synergy between International APPA, the regions, and chapters.
  - Keep International 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.

#### FINAL REPORT

A final report of Phase 2 of this important work was provided to the APPA Board of Directors at its meeting on July 15, 2012 in Denver. The deliverables were targeted as:

- Provide “actionable” guidelines for roles and responsibilities for International APPA, the regions, and chapters.
- Prepare a statement of impacts on International APPA, the regions and chapters’ membership dues (to include business partners and other stakeholders as appropriate.)

- Document with an implementation action plan.

Examples of just a few of the actions identified so far are:

- Continue to develop and promote the APPA Drive-In Workshops within the regions and chapters.
- Continue to deliver the Supervisor’s Toolkit training program while also increasing the number of deliveries, attendees, and trainers.
- Continue to expand APPA’s credentialing program.
- Continue to develop the Community College, HBCU, and K-12 initiatives.
- Identify institutional leaders to develop and foster new state and local APPA-affiliated associations.
- Identify a number of options for delivering an integrated membership dues billing approach.
- Appoint a task group of interested business partners to explore and make

recommendations of how to build on the relationships with International APPA, the regions, and the local chapters.

By all accounts, both task forces have done stellar work, and provided International APPA and the regions (and potentially the chapters) with an implementation roadmap, further delineating the actionable items; metrics; timelines; liaisons; responsible party(s); links to the APPA strategic plan; and lines of accountability for their execution. We thank all of them profusely for the significant amount of time and effort they put into both project phases. All of this work will be shared in greater detail with the regional boards and chapters during the fall 2012 annual meeting season. ☺

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