

state of the at AP

BY E. LANDER MEDLIN

Since its founding in 1914, APPA has become a premier association serving its diverse membership of international educational institutions in all areas of facilities management. APPA's programs, products, and services are designed to equip facilities professionals with the technical knowledge and necessary administrative acumen to fulfill their vital role in managing educational facilities and pursuing proper organizational alignment with the institutional vision, mission, and strategy.

This year we have been actively focused on the accomplishment of numerous initiatives in support of APPA's Strategic Plan and engaged in the launch of APPA's 100-year anniversary. The Strategic Plan is intended to strengthen the overall position of the organization, the profession, and the institutions we support and represent. This plan contains **Objectives** that articulate the desired results, **Five Leading Strategies** that define actions, and **Five Foundational Elements** that buttress each strategy in the achievement of our stated objectives.

APPA's financial stability is critical to the achievement of our objectives. Our diverse portfolio of programs, products, and services continues to ensure a stable financial position so that we remain that strategic voice for the educational facilities profession. This has proven to be an effective strategy over time. I am pleased to report that we closed this fiscal year 2012-2013 with a surplus balance of \$74,285 from our annual operating funds. Targeted revenue enhancements in such areas as the APPA 2012 conference in Denver; publications sales and Job Express advertising; and the array of educational offerings (in particular the latest local deliveries of the Academy-on-Campus) contributed to this positive bottom line. Keeping a close eye on daily expenses and event management also contributed to our positive net surplus position. In addition, the value of our headquarters building (which we own outright) continues to rise in value now at \$2.4 million.

By strategically targeting our actions and effectively utilizing and leveraging our resources, we are on track to achieve our stated Objectives:

- a fully engaged group of stakeholders,
- across an increasingly diverse membership body,
- where there is greater alignment and synergy amongst and between international APPA, its regions, chapters, and international alliances;
- thereby achieving measurable influ-

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- ence and credibility throughout the entire educational enterprise; and ultimately,
- Increase overall value to you, our members.

Our programs, products, and services provide both a professional development career continuum and an institutional development pathway that is unparalleled in the industry. Our role is to elevate educational facilities professionals into influential leaders in education who, in turn, create inviting and supportive institutional learning environments, thus increasing the credibility and influence of the facilities profession. Hence, our vision: “to become a global partner in learning by fostering competency, collaboration, and credibility for the facilities professional and their organizations in support of the institutional mission.” The 3 Cs—competency, collaboration, credibility—remain a key and consistent focus 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 significant revision of the Operational Guidelines Trilogy—consisting of the maintenance trades, custodial services, and grounds man-

BOK

Body of Knowledge

agement—and the alignment of the online BOK (Body of Knowledge), which updated and replaced the *Facilities Management* manual as an institutional member benefit. This gives *any and all* individuals at your institution full access (24/7) to this wealth of information. In addition, if your resource library does not include the Web-based *Facilities Performance*

Indicators (FPI) report and dashboards and our books *Strategic Capital Investment*, *The Green Campus*, 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*, *The Impact of Facilities on Student Recruitment and Retention*, and *Stewardship & Accountability in Campus Planning, Design & Construction*, you should quickly ensure that it does.

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 (such as 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. In addition, we are pleased to announce the addition of another powerful module for energy and sustainability assessment (ESAT). Institutions will be able to utilize this new FPI tool to monitor and manage individual building energy data. Decision-making strategies based on solid ROI data are but one positive aspect of this new tool. Don't hesitate to contact us for more information on this invaluable resource. And, yes, these tools and reports are available free to member institutions who participate in the data collection survey phase. An incredible member value!

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;



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and the APPAinfo discussion list that boasts over 1,030 subscribers.

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 40 research projects have been completed to date.

The content and appeal of APPA's vast array of educational programs are now available practically under one roof. We call this co-location of programs "APPA U" consisting of the

APPA U

Institute for Facilities Management, the Leadership Academy, Credentialing Prep Course, and Su-

pervisor's Toolkit. These programs 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 APPA U.

Drive-In Workshops continue to expand and flourish. These locally-delivered programs are completely supported by the business partner community. What better way to connect with educational facilities professionals locally to "lunch and learn." If you are a business partner, take advantage of the opportunity to sponsor one of these deliveries. The visibility and exposure is unbeatable.

Of particular note is APPA's annual conference (simply called "APPA 20XX"). We have featured best-of-breed panelists and speakers who focus on future solutions to your 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 the conference and ensures differentiation from regional and state or chapter meetings. Co-located with APPA 20XX, we continue to deliver a distinct and successful program for senior facilities officers and their senior leadership called the SFO Summit. This one-day, pre-conference program is really hitting the mark. In addition, we developed an Emerging Professionals (EP) Summit for inaugural delivery at the APPA 2013 conference. This is an exciting new pre-conference program that

CFaR | Center for Facilities Research

brought together EPs in a face-to-face setting, aligned with the SFOs for a session, and helped them grow further in the profession. These

programs are essential to provide a continuum of professional development career opportunities for all educational facilities professionals.

To add to this continuum of professional development career opportunities and to complement our competency-based programs and services, APPA offers a credentialing and certification program comprising two credentials. The first credential is a knowledge-based credential called the EFP (Educational Facilities Professional) targeted to the less experienced/emerging educational facilities professional. As a result, over 350 individuals have now achieved the status of EFP. But the real end game in credentialing is the CEFP (Certified Educational Facilities Professional).



This second credential is a full certification for the more experienced 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. More than 180 individuals have earned the CEFP designation. These credentials are essential for the future engagement of our emerging facilities professionals in the educational workplace and to increase the credibility of the facilities profession at educational institutions. The associated, combined preparatory course will continue to be delivered locally upon request, but will soon be offered online. The exams are already offered online, so you can sit for the exam right now at your institution! For more information, visit the newly designed website.



COLLABORATION

Strategic collaboration and partnering enhances your membership value and increases the depth and breadth of research and information. APPA's work with NACUBO, SCUP, AASHE, 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. Articles in NACUBO's *Business Officer* magazine support and further strengthen facilities professional's efforts at their respective institutions. The joint ACUHO-I/APPA Housing Facilities Conference is an important program offering for both the campus housing and facilities professional (offered annually and collectively each fall). The Women's Leadership Institute is offered collaboratively each December by 13 higher education associations.



Treasurer's Annual Report — 2012-13

Peter Strazdas
APPA Secretary-Treasurer
Western Michigan University



Our membership should again be pleased with APPA's financial success. This year ending March 31, 2013, APPA posted a surplus of \$74,285. The APPA staff and the Board of Directors understand the budget pressures our members face in this challenging economy. Therefore, we continue to take a conservative approach with our budget while focusing on offering value and quality services for our members.

APPA experienced an operating surplus given a good turnout of registrants for the annual conference in Denver last year along with significant support from our business partners. Our face-to-face educational programs did better in terms of registrants and hotel contract management along

with the newly added area of local delivery of the Academy-on-Campus, thereby positively adding to the net bottom line. Additional revenue from publications and job advertising sales also contributed to this surplus. We will continue to focus on and further recalibrate all programs and their cost of delivery for this coming fiscal year (2013-2014) to ensure a continued balanced budget.

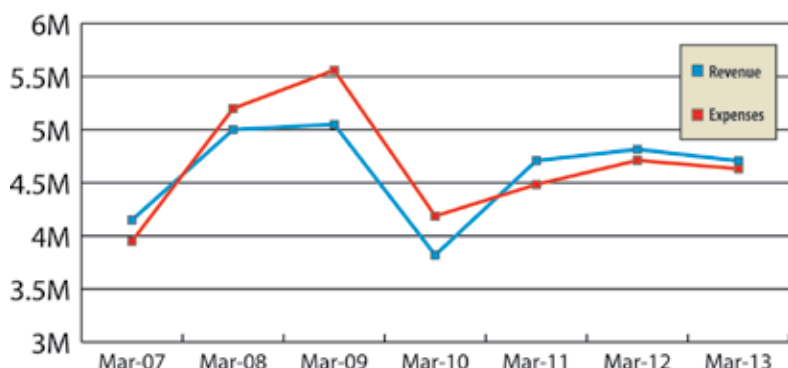
Our operating and capital reserves remain at \$369,000 (with Operating at \$300,000 and Capital at \$69,000). The APPA headquarters building not only held its value but appreciated somewhat with an assessment at approximately \$2.4 million as of February 2013 by the City of Alexandria. APPA owns its headquarters offices outright.

Graph 1 shows the six-year history of revenues and expenses for APPA. Graph 2 shows the year's revenues and expenses by activity/program. Membership expenses, totaling \$387,229, reflects 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 the direct cost of many APPA activities such as the website and database management; a portion of research and development; office operation; and planning 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.

The Board and the APPA staff remain committed to delivering excellent programs, products, and services in as cost effective a manner as possible. We will focus on non-dues revenue opportunities and provide you the best value for your membership. Our financial condition is enhanced by membership that is APPA active. Please encourage your peer institutions to be engaged in their professional organization.

Graph 1

REVENUES & EXPENSES 2007-2013



Graph 2

SOURCES & USES OF FUNDS 2012-2013



In addition, we have targeted K-12 schools with SRAPPA's regional efforts and through the Virginia School Plant Management Association (VSPMA) for delivery of the FPI, Toolkit, and our credentialing program. Our international efforts remain strong through our international strategic alliance agreements (AUDE-Association of University Directors of Estates; TEFMA-Tertiary Education Facilities Management Association; and HEFMA-Higher Education Facilities Management Association of Southern Africa).

Thanks to the funding received from ASHRAE for a major research project on the principles of Total Cost of Ownership (TCO), we have engaged members, organizations, associations, and federal agencies across the entire field of facilities management. We continue to roll out more details on this project and are attempting to link TCO to the FPI and ESAT tools.

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. Visit our website for more details about our combined offerings to take advantage of these relationships.

Finally, we have furthered our efforts to target the emerging facilities professional—someone who has recently begun a career in the field of facilities management at an educational institution. Beyond the monthly regular “exchange” via conference call (all EPs invited), these individuals gain insight from and provide input to senior APPA leadership. Their ideas and perspectives are being readily adopted.

CREDIBILITY

As part of our strategy to expand knowledge and research, APPA, with generous support from both DTZ, a subsidiary of UGL, and Jacobs, delivered its eighth annual Thought Leaders symposium this past April 2013. 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 education and the top critical facilities issues for fiscal years 2006 through 2012 have been published as monographs and

disseminated to facilities professionals and senior institutional officers. We also presented and/or disseminated the 2012 monograph on “Campus Space...An Asset and a Burden” to members of CAUBO, NACUBO, and SCUP, respectively. The 2013 Thought Leaders symposium focused on the criticality of ONE trend in higher education: the rising cost of higher education with particular respect to the built environment. This new monograph can be ordered from the APPA bookstore, and Part 1 is included in this issue of *Facilities Manager*. Those who attended the SFO Summit in Minneapolis received a sneak preview of the Executive Summary.

It is just this type of research and information 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.

Engagement in a Facilities Management Evaluation Program (FMEP) review is yet another way to assess your organization and its delivery system and attest value to senior institutional

The AKF logo is prominently displayed in the center, with the letters 'A', 'K', and 'F' in a large, bold, sans-serif font. Below the logo, the text 'Engineering • Commissioning • Testing • Technology • Lighting' is written in a smaller font. Further down, a white box contains the text: 'WE'D LIKE TO CONGRATULATE APPA FOR A SUCCESSFUL 2013 CONFERENCE IN MINNEAPOLIS AND THANK MEMBERS FOR ATTENDING THE EVENT!'. At the bottom right, the website 'www.akfgroup.com' and contact information 'Contact: Jim Sebesta, PE, 212.626.0172' are provided. The background of the entire block is a grayscale image of a modern building's geometric facade.

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officers. More information about this valuable program is available on the APPA website.

Environmental issues and compliance concerns remain an important part of our public policy agenda. The explosion of regulatory issues and code compliance signals the renewed importance of the Board's decision to establish a Standards and Codes Council reporting to the President of the association. The Council established a "standards portal" through the APPA website and successfully advocated policy positions with the NFPA, NEC, and ASHRAE, thereby avoiding additional costs and/or saving educational institutions millions of dollars. The Council is now exploring a path forward for creating a standards and codes setting body for the education sector. Working groups at all levels of the APPA organization will be needed for broad-based input and engagement. 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*.

Deferring professional development in whatever form is no more an alternative for you and your staff than deferring facilities maintenance/renewal is for your institutions. 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.

Therefore, 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.

Through this 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. Rely on APPA as the strategic voice across the educational enterprise for the facilities profession. Just as your contributions will be key to help shape the future of education at your institution, APPA's contributions will be key as a significant voice on strategic institutional issues for the facilities profession. (S)

Lander Medlin is APPA's executive vice president and may be reached at lander@appa.org.



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