



# ANNUAL REPORT

## *To Membership*

### 2016- 2017



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## ERAPPA BOARD 2016 – 2017

President	Steve Peary – University of Vermont
President - Elect	Kevin Mann – Salisbury University
Vice President, Professional Development	Jessica Abbott – University of Hartford
Vice President, Membership	Patty Smith – New Jersey City University
Vice President, Annual Meetings	Matt Yencha – Cedar Crest College
Vice President, Technology and Communications	Paul Martin – Western University Canada
Vice President, Chapter Affairs	Pete Buchheit – University of Pittsburgh Bradford
Secretary	Jon Terry – Quinnipiac University
Treasurer	Arthur Walsh – Dalhousie University
Past President	Elizabeth Clark – Pennsylvania State University
APPA Liaison to ERAPPA	John Bernhards – APPA
Business Partner Representative	Amy Baker – Parette Somjen Architects, LLC

## ERAPPA Reps to APPA Committees 2016 – 2017

Professional Development Committee	Kevin Simpson - AAPPA
Membership Committee	George Stooks - NYAPPA
Information & Research Committee	Dan Gearan – NNECERAPPA
Awards & Recognition Committee	Elizabeth Clark – KAPPA
Professional Affairs Committee	John Michalewicz – SNEAPPA
Nominating Committee	Steve Peary – NNCERAPPA
Bylaws Committee	Kevin Mann - MDCAPPA
Emerging Professionals Committee	Jessica Abbott - SNEAPPA



## President's Message

Steve Peary, ERAPPA President 2016-2017

University of Vermont

Dear ERAPPA family, it has been an honor to serve as your ERAPPA President this past year! The trust you have shown in me is humbling and inspiring. My APPA journey started in 1998, first at the chapter and soon after the regional and international level. I have stayed involved and engaged because it has always felt good to give back to something that has provided so much education, guidance, and growth. This year I realized a growing sense of ownership in and responsibility for ERAPPA that continues to guide me. I wish to extend a heartfelt thanks to all of you for allowing me this opportunity to serve. Please read on to see how ERAPPA has grown this past year.

We are indeed part of something special. This collection of colleagues across our region is like no other. No matter the size or location of our institutions, we face similar challenges and share in the same triumphs. At the ERAPPA Annual Meeting and through ERAPPA programming delivered throughout the year, we learn with and from each other, share best practices, commiserate over our challenges, and strive for something better.

The engagement I have witnessed by our members who serve on Host Committees, ERAPPA Committees, APPA Committees, and as Board Members is unparalleled. The quality of the work and effort put forth by these individuals is outstanding – and remember, these are all volunteers! All of the benefits you have come to enjoy through your ERAPPA membership – quality Annual Meetings, professional development webinars, local delivery of APPA programming, and a robust scholarship program – are all a result of this dedicated group of individuals. As you continue to partake of the benefits of your ERAPPA membership, please consider giving back to the organization through service in one of the aforementioned roles. Being an engaged member of the organization's leadership is rewarding and enlightening. Join us and help us grow the membership, broaden our offerings, and continue our success!

In the last year, the ERAPPA Board has worked on a number of initiatives stemming from the organization's Strategic Plan. We continue to focus on providing outstanding educational and professional resources to our members, expand our membership, and engage our Business Partners in the organization. As such, the following initiatives have been at the forefront of our discussion, planning, and action since October 2016:

**APPA Credentialing Initiative** – Still our largest financial undertaking outside of the ERAPPA Annual Meeting, we designed this professional development initiative to target and benefit as many ERAPPA members as possible. The ERAPPA Board is continuing the complete sponsorship of the APPA credentialing preparatory course and examination for the Educational Facilities Professional (EFP) and Certified Educational Facilities Professional (CEFP) programs. While we do have a target number of participants in mind, at this time the program is open-ended. To date, 152 of your ERAPPA colleagues have obtained the CEFP credential and 110 have obtained EFP credential. The Board is delighted in the uptake for this program and encourages all ERAPPA members to consider how the EFP or CEFP may benefit you both personally and professionally.

**Business Partner Liaison and Committee Members** – The relationship between institutional members and our business partners continues to flourish with increased and meaningful interaction from the floor of the Hall of Resources through ERAPPA Committees to the Board. The integration of Business Partners into the ERAPPA Board and Committees has served to clarify needs and expectations from and for institutional members and business partners. To that end the BP committees has developed the roles and responsibilities of their committee and a document that summarizes all the benefits of being a Business Partner. Recognizing that our business partners are subject matter experts in a number of areas of interest to our institutional members, the Board voted to operationalize the ERAPPA lunch-and-learn webinar series. The series will continue to cover a variety of facilities-related topics and will occur quarterly.

**Finances** – The ERAPPA organization is fiscally strong. The Board continues to act responsibly as the stewards of ERAPPA’s assets and is very thoughtful and thorough when it drafts, reviews, discusses, and adopts its annual budget. They are ever mindful of economic uncertainty and the shifts in planning and pricing in the hospitality industry while budgeting for future Annual Meetings and ERAPPA’s operating budget. We look for opportunities to positively affect as many members as possible with the decisions we make, looking to put your membership dollars to the best possible use. Each Board member is an advocate for conservative financial management with maximum benefit to the membership. Our financial position is strong as is our commitment to your success.

**Virtual Presence** – The ERAPPA website receives continuous improvement as new content and features are required or requested. The organization of the site has changed this year to make it easier to navigate and to find the information you are looking for quickly. One significant change this year is the creation of a member login area where our members can get even richer content and items that exemplify the value of being an ERAPPA member. This includes the ability to share best practices and solutions; search and view past webinars; search and view ERAPPA and chapter presentations; discussion lists that capture the conversation for research by others later; and the ability to connect with FM professionals in our region with certain skills as captured in our profiles.

In addition to these initiatives and in keeping with my theme of “Sustainment”, the Board has also focused on our internal governance. We have completed our annual insurance reviews, undergone a complete financial audit, and maintained the organization’s tax-exempt filings. When necessary, we have adopted new or amended established policies, procedures, and practices to ensure the organization continues to operate effectively.

On behalf of the Board, I extend sincere thanks to all of the volunteers who have worked so hard to make all of the aforementioned accomplishments happen. This is an extraordinary organization made up of extraordinary people. I am fortunate to have worked with them in the last year. Finally, an oversized thank you goes out to Sheri Vucci, Kelly Geishauser, and the entire 2017 Host Committee for their efforts in planning and delivering another high quality Annual Meeting.

## Chapter Affairs Committee

Peter Buchheit, Vice President

University of Pittsburgh



### The ERAPPA Chapter Affairs Committee Representatives for 2016/17 are:

<b>Greg Clayton</b>	President Atlantic Provinces	AAPPA
<b>Dawn Barnett</b>	President Delaware Valley Chapter	DVAPPA
<b>Dan Barlup</b>	President Keystone Chapter	KAPPA
<b>Sherell Vucci</b>	President Maryland-DC Chapter	MD/DC APPA
<b>Todd Miller</b>	President New Jersey Chapter	NJAPPA
<b>Barry McHugh</b>	President New York Chapter	NYAPPA
<b>Rick Battistoni</b>	President Northern New England Chapter	NNECERAPPA
<b>Paul Martin</b>	President of Ontario Universities	OAPPA
<b>VACANT</b>	President of Ontario Colleges	OCFMA
<b>Keith MacDonald</b>	President of Southern New England Chapter	SNEAPPA

### Outgoing Members during 2016/2017:

<b>Charles Bagley</b>	Maryland/DC Chapter	MD/DC APPA
<b>Charles Nieves</b>	New Jersey Chapter	NJAPPA
<b>John O'Shaughnessy</b>	Northern New England Chapter	NNECERAPPA
<b>Mike Patterson</b>	Delaware Valley Chapter	DVAPPA
<b>Tom St. Ivany</b>	Ontario Universities	OAPPA
<b>Andy Wilson</b>	Keystone Chapter	KAPPA

### CHAPTER LEADERSHIP

There has been a number of changes at the president's level in our chapters. I am sure the new group will bring the same level of enthusiasm and provide impressive leadership to their chapter constituents.

There is so much opportunity for chapter president's to take the APPA message back to their respective chapters and promote the opportunity that our APPA membership offers.

### GOVERNANCE

During the 2016-2017 year the ERAPPA board has started the process of a new strategic plan. The chapter president's will have an opportunity to comment on this plan and be the catalyst to promote the strategic plan at the chapter level.

There will also be a concerted effort by the chapter president's to draw a larger pool of prospective candidates for the ERAPPA Board. This will be a primary objective for the coming year.

## **FINANCIAL**

As we all are witnessing the increasing financial concerns at our institutions, we continue to strive to find avenues for our memberships to attend the multitude of **APPA related educational offerings** available throughout the region. To this end we are offering more local programs, as they become available, and are seeing very promising attendance at these. This year ERAPPA continues to offer the opportunity for all ERAPPA members to take the EFP-CEFP credential exam at no cost to the member. This is a good value and can be done without travel. The webinar series is continuing on a quarterly basis with some exceptional programs at no cost.

## **CHAPTER MEETINGS**

Several chapters have witnessed record attendance at their chapter meetings. This is a healthy sign that the work we do at all APPA levels is credible and important to the profession. Please see chapter president reports for further detail on their chapter.

## **SCHOLARSHIPS**

With the multitude of chapter, regional, and national **scholarships available**, we are proud that over 21 individuals have applied for an ERAPPA scholarship. With the credential scholarship being an added bonus to your membership we continue to demonstrate the value of ERAPPA.

## **CHAPTER INITIATIVES**

With the core mission of all chapters being, **to better educate our members**, the methods of delivery are ever-changing and the chapter presidents are using the increasing new avenues as well as being leaders in promoting new methods of delivery.

## **MID-YEAR MEETING**

This year's **Mid-Year Meeting** in Washington, DC, the chapter presidents had a lively discussion to improve the governance of ERAPPA. With new strategic planning now under way the chapter will have input through their president and committee members to help shape the future of ERAPPA. We had the opportunity to view this wonderful city and hope the attendance at ERAPPA 2017 provides not only a great educational product but time to see the Capital of the United States.

## Technology and Communications Committee

Paul Martin, Vice President

Western University



The ERAPPA Technology & Communication Committee Representatives for 2016/17 are:

<b>Craig Hickey</b>	Atlantic Provinces	AAPPA
<b>David Rabold</b>	Delaware Valley Chapter	DVAPPA
<b>Rick Phillips</b>	Keystone Chapter	KAPPA
<b>Jason Sawyer</b>	Maryland-DC Chapter	MD/DC APPA
<b>Lavone Broxton</b>	New Jersey Chapter	NJAPPA
<b>Billy Gagnon</b>	Northern New England Chapter	NNECERAPPA
<b>John Moore</b>	New York Chapter	NYAPPA
<b>Peyton Gibson/ John Marshall</b>	Southern New England Chapter	SNEAPPA
<b>Gordon Robbins</b>	Ontario Universities	OAPPA
<b>Rich McEvoy</b>	Ontario Colleges	OCFMA

**Outgoing Members during 2016/2017:**

<b>Tim Garland</b>	Northern New England Chapter	NNECERAPPA
<b>Jennifer Grimm</b>	New Jersey Chapter	NJAPPA
<b>Sheri Vucci</b>	Maryland/DC Chapter	MD/DC APPA

### A. Host Committee Liaison

Web Sites for Hosts –

- Provide Guidance and support to Maryland/DC MDDCAPPAs as they prepare for ERAPPA 2017.
- The 2017 Host Committee is managing the website for ERAPPA 2017.
- First year the new conference template process was used for the launching of the website no problems were reported.
- 2018 Host Committee is ready to launch site has been turned over to Ogo Sense to launch after ERAPPA2017

### B. Benchmark

Benchmark had a few problems as users became familiar with the process. We have linked the Benchmark product to @ERAPPA.org providing a link to the ERAPPA website this has reduced the number of servers blocking the email messages.



### **C. Web Site**

Major changes were made to the ERAPPA website this year with the strategic initiative with Ogo Sense our website provider:

- Members only section created and rolled out to ERAPPA members
- Members profiles were created which will grow to include information on members allowing members to target queries to other like members
- Webinars launched last year by Business Partners have been loaded into the members only section for members to access any time
- Conference presentations from 2015 & 2016 conference have been uploaded to the members only section
- ERAPPA chapter events have been linked from each chapter to the ERAPPA website providing all members with a view to events happening across the region.
- T&C members for each chapter now take responsibility for uploading job posting for their area as well as supporting the following ERAPPA areas:
  - o Membership – David Rabold & Jennifer Kelemen
  - o Professional Development – Craig Hickey & Tim Garland
  - o Annual Conference - Peyton Gibson, John Marchall & Jason Sawyer
  - o Chapter Affairs – Rich McEvoy & John Moore
  - o Technology and Business Partners – Gordon Robins & Rick Phillips

### **D. Chapter Web Sites**

- Hosting of Chapter Web Sites
- ERAPPA continues to offer hosting of Chapter Web Sites on the ERAPPA web Server.
- This continues to be available with our new web hosting service, most chapters are now utilizing content management systems hosted by the same service.
- This year the T&C team is looking to link news from the various chapter websites to be linked to the ERAPPA site.

### **E. Webinars presented by ERAPPA's Business Partners**

- Technology team supported the Business Partners as they launched a series of free web sessions for ERAPPA members.

### **F. Conference Call Service**

- Conference Call Hosting

- ERAPPA continues to offer hosting of conference calls for the ERAPPA Board, ERAPPA Committees, and Chapter use. Conference call services are now being scheduled through the ERAPPA Web site.

#### **G. Social Media**

- It is hoped the 2017 Host committee uses social media during the 2017 ERAPPA conference.

## Membership Committee

Patty Smith, Vice President

The College of New Jersey



### The ERAPPA Membership Representatives for 2016/17 are:

<b>Marina Theriault</b>	Atlantic Provinces	AAPPA
<b>Andrew Feick</b>	Delaware Valley	DVAPPA
<b>Andrew Wilson</b>	Keystone	KAPPA
<b>Nancy Yeroshefsky</b>	Maryland/DC	MDDCAPPA
<b>Vacant</b>	New Jersey	NJAPPA
<b>George Stooks</b>	New York	NYAPPA
<b>Kathy Kokin</b>	Northern New England	NNECEAPPA
<b>VACANT</b>	Ontario Colleges	OCFMA
<b>VACANT</b>	Ontario Universities	OAPPA
<b>VACANT</b>	Quebec	QUEBEC
<b>Melinda Lamoureux</b>	Southern New England	SNEAPPA
<b>VACANT</b>	Business Partner	NJAPPA
<b>John Bernhards</b>	Associate VP	APPA

### Outgoing members and vacancies during 2016/2017:

<b>Jessica Abbott</b>	Southern New England Chapter	SNEAPPA
<b>Dan Burlup</b>	Keystone Chapter	KAPPA
<b>Stephen Sicluna</b>	Ontario Universities	OAPPA
<b>Connie Simmons</b>	Northern New England Chapter	NNECERAPPA
<b>Richard Stomber</b>	New Jersey	NJAPPA
<b>Nancy Yeroshefsky</b>	Maryland/DC	MDDCAPPA
<b>Voula Liacopulos</b>	Business Partner	NJAPPA

**The Membership Committee met twice this year:** (1) at the ERAPPA Annual Meeting in Niagara Falls, CA and (2) during the ERAPPA Mid-Year Meeting in Washington, DC. It was also at this meeting that the committee held joint meetings with the Professional Development Committee and the ERAPPA Business Partner Liaison. Conference calls were held and emails were exchanged with the committee throughout the year.

### The year's focus was on:

- Recruitment and Retention
- Capturing events occurring at the local levels to share engagement ideas
- Exploring ideas for managing membership lists
- Contributing essays to the FM publication for Membership Matters section
- Utilizing APPA data to retrieve lost members
- Enhancing the First Time Attendee reception to ensure it is a valuable experience for all involved

## A. ERAPPA Membership Committee Mission Statement

The ERAPPA Membership Committee is organized for the purpose of maintaining proactive relationships with all categories of membership, and for maintaining and growing the number of members. The Committee provides strategic guidance to retain and grow an actively engaged membership and recommends to the Board strategies for growing ERAPPA membership and retaining current members. The Committee accomplishes this in part by working closely with APPA, the Chapters and by producing and approving annual member recruitment goals and strategy, and periodically reviewing and adjusting the goals as needed. Finally, the Membership Committee provides perspective on the needs and expectations of ERAPPA's membership and works in tandem with other ERAPPA committees to assist in meeting those expectations.

## B. First Time Attendees Reception

Planning occurred for the 13th Annual First Time Attendee Reception being held in Washington, DC the FTA:

- Provides an opportunity for new attendees/members to meet the Membership Committee, ERAPPA Board, Chapter Presidents, and APPA executives, as well as to network with other new members.
- Provides valuable information about the conference and how to get the most out of their experience, and introduces them to the next year's conference. Continued evolution of the ice-breaker format to welcome the newest attendees
- Provides a platform for new attendees to learn the organizational structure and it allows new attendees to learn about upcoming conferences

## C. Scholarships and Recognition

The Ambassador Scholarship program opened on April 1, 2017 and ten scholarships were awarded and accepted. The following members will be attending their first ERAPPA Annual Conference ever or for the first time in 5+ years.

**The 2017 ERAPPA Ambassador Scholarship winners are:**

Chapter	Last Name	First Name	Institution
MDC	Dent	David	George Washington
AAPPA	Therriault	Marina	Dalhousie University
NNEAPPA	Baker	Tom	Norwich University
MDC	Birch	Nancy	Salisbury
KAPPA	Bosnell	Allen	PSU
NJAPPA	Broxton	Lavonne	Montclair State University
MDC	Granados	Eder	American University
MDC	Schlesinger	Maurry	St. Mary's College
NYAPPA	Walters	Matt	Ithaca College
NNEAPPA	Harper	Gary	The Derryfield School

#### D. ERAPPA Membership Goals

Committee members were actively engaged in recruitment efforts, reaching out to potential institutional members and those who had not renewed memberships. Additional goals included:

- ✓ Award all Ambassador and Educational scholarships, with a primary focus of increasing the total number of applications received and broadening the number of chapters submitting applications.
- ✓ Create stronger alliances with the PD Committee and partner to attract new members at the local chapter level using Professional Develop as the “bait” and robust programming as the “hook”. Strong chapters equals strong region
- ✓ Continue to contribute strong essays to the Membership **Matters Section of the Facility Manager Publication**.
- ✓ Support the initiative that has resulted in ERAPPA offering FREE access to the APPA **Credentialing** program.
- ✓ Continue to improve the **First Time Attendees Reception** to enrich the experience.

## Professional Development Committee

Jessica Abbott, Vice President

University of Hartford



### The ERAPPA Professional Development Representatives for 2016/2017 are:

<b>Kevin Simpson</b>	University of New Brunswick, St. Johns	AAPPA
<b>Tim Korn</b>	Muhlenberg College	DVAPPA
<b>Bob Unger</b>	PA State System of Higher Education	KAPPA
<b>Julius Williams</b>	University of Maryland	MDDCAPP
<b>Joana Gonzalez</b>	Montclair State University	NJAPPA
<b>Andrew Germain</b>	Cornell University	NYAPPA
<b>Tim Garland</b>	Keene State College	NNECERAPPA
<b>Doug Michael</b>	University of Rhode Island	SNEAPPA
<b>VACANT</b>	Ontario Colleges	OCFMA
<b>Kevin Gallinger</b>	Carleton University	OAPPA
<b>Amy Baker</b>	Parrette Somjen Architects	Business Partner

### Outgoing members during 2016/2017

<b>Karl Ingoldsby</b>	Winnacunnet High School	NNECERAPPA
<b>Phil Rouble</b>	Algonquin College	OCFMA
<b>Julius Williams</b>	University of Maryland	MDDCAPP

### The Professional Development Committee met twice this year:

At the ERAPPA Annual Meeting in Niagara Falls, Ontario.

The Committee continues its active involvement with and in support of the Host Professional Development Committee as they prepare, organize, and host the five diverse tracks of educational programming over the two core days of the Annual Meeting. The Professional Development Committee and Host PD Committee collaborated throughout the annual meeting to ensure that all presentations were staffed, supported, run smoothly, and met the expectations of the attendees.

At the ERAPPA Mid-Year Meeting in Washington, D.C.

Professional Development Committee members worked closely with the Host Professional Development Committee to carefully review and narrow down the 56 viable presentation submissions (83 received total) to select the 33 presentations (two double sessions that are two hours long) that will be offered at the Annual Meeting.

Conference calls have been held monthly and emails were exchanged with the committee throughout the year.

**ERAPPA Initiatives:**

**Lunch & Learn Webinars** – The initial four pilot webinars hosted by ERAPPA between September 2016 and March 2017 were a large success. 588 total people viewed the first four live webinars and based on survey feedback, a majority of viewers found the presented information useful and rated the presentations as high quality. 100% of those who participated in the survey voted yes for ERAPPA to continue to host and sponsor these webinars.

A fifth webinar was conducted in May 2017, calling on a presentation from the 2016 Annual Meeting that had positive reviews. In June 2017 the Board voted to continue with the Lunch and Learn Webinar Series, but switching to quarterly instead of every other month at the recommendation of the Business Partner Committee & Professional Development Committee. Topics/speakers for the scheduled webinars in August 2017, November 2017, February 2018, and May 2018 were selected from the ERAPPA 2017 Call for Presentations.

The Professional Development Committee will continue to work with the Business Partner Committee to review and select presentations for future webinars. Members of the PD Committee serve as the Speaker Liaison through the process of each webinar; reviewing the three communication pieces promoting the webinar, reviewing the presentation content, and providing feedback on that content.

The PD Committee and Business Partner Committee are intending to coordinate a specific "Calls for Webinar Submissions" as well as continuing to look at suitable topics that were well received at the annual meeting and its call for presentations.

**Continuing Education Credits:**

**Program Certifications** – The PD Committee continues to certify qualifying programs for AIA Continuing Education credits for AIA Members and Architects at the Annual Meeting. The PD Committee supplies certificates of attendance for all attendees who may use these offerings to document their attendance toward fulfilling their discipline's continuing education requirements. This year at the Washington D.C. Annual Meeting 21 presentations have been approved for AIA CEU credits and 3 of those achieved the AIA's more rigorous Health, Safety, and Welfare designation.

**Credits for Chapter Programming** – The PDC can assist chapters to get programming certified for AIA Continuing Education credits.

The committee continues to work with APPA and each other to understand the continuing education needs and documentation requirements of facilities professionals from varied educational and professional backgrounds and to understand how these requirements may vary by Province or State.

**APPA Initiatives:**

**EFP/CEFP Credentialing** – ERAPPA, working with APPA, has underwritten the cost associated with these desirable certifications. Since ERAPPA started subsidizing the cost in March 2016, 222 individuals have signed up to pursue these credentials, demonstrating their commitment to professional development within education facilities management. In 2016, 35 people from ERAPPA earned their credentials (8 EFP and 27 CEFP) and so far in 2017, 61 people from ERAPPA have earned their credentials (11 EFP and 50 CEFP).

*All stats as of 9/25/2017.*

**Drive-In Workshops** - APPA's Facilities Drive-In Workshops are an excellent way for APPA member institutions to spotlight their campus and encourage networking and professional development among educational facilities professionals within a short drive at no cost to the host or attending institutions. Drive-Ins in the prior year have been held at three locations within ERAPPA: Quinnipiac University, Community College of Allegheny County, and University of Rochester

**Supervisor's Toolkit** - Specifically tailored to meet the needs of developing supervisors in the facilities management profession. Supervisor's Toolkit has successfully been dovetailed within each annual meeting, and has been offered in several ERAPPA chapters through the year. It consistently fills the room, attracting staff from multiple institutions and sometimes neighboring chapters.

**APPA U** – The Institute for Facilities Management, The Leadership Academy, and Navigating the Facilities Portfolio (APPA's Graduate Program) were held January 15<sup>th</sup> – 19<sup>th</sup> 2017 in Dallas, Texas and September 10<sup>th</sup> – 14<sup>th</sup> in Providence, Rhode Island. During the January APPA U there were six graduates from The Leadership Academy from institutions within the Eastern Region and fifteen graduates from the Institute for Facilities Management. During the September APPA U there were seven graduates from the Institute for Facilities Management from institutions within the Eastern Region.

*The Institute for Facilities Management* offers four core course tracks during each week-long session: General Administration & Management; Maintenance & Operations; Energy & Utilities; and Planning, Design & Construction. Institute students select one core area that will be the focus of their classes for that week. Morning classes consist of required courses, centering on the core area selected. Afternoon classes are electives chosen by the student and may be a combination from any of the four core areas. Upon completing each week-long session, students will receive a certificate of completion designating their core area of study and 3.0 continuing education units (CEUs). To receive maximum benefit, APPA recommends that students work towards graduation from the full Institute program by completing all four core areas.

The purpose of *The Leadership Academy* is to enhance and further develop leadership throughout the educational industry. It provides opportunities for administrative professionals to increase their awareness of industry issues, learn the skills necessary to handle today's changes, and discover the leadership potential within each of us. The Leadership Academy has been developed for, and focuses on, the educational institution's facilities staff, buyers/purchasing agents, business/finance professionals, and auxiliary services professionals. Academy attendees focus on one of four tracks per session: Individual Effectiveness Skills; Interpersonal Effectiveness Skills; Managerial Effectiveness Skills; and Organizational Effectiveness Skills – A Seat at the Table. Graduates of The Leadership Academy are uniquely prepared to demonstrate the value of the facilities department in furthering their institution's educational mission.

*The Graduate Program, Navigating the Facilities Portfolio*, allows attendees to develop innovative solutions to long standing problems; discuss current facilities issues; discover the latest trends in educational facilities; engage the use of metrics and discuss how to use KPIs to make informed decisions; discuss the latest Thought Leaders Series topic; and network with other graduates from across North America. Deep dive discussion topics are selected by the attendees and attendees may attend Institute electives on Tuesday and Thursday afternoons. If you have completed either APPA's Institute



for Facilities Management and/or Leadership Academy, you are eligible to register for the graduate program.

**Thought Leaders Series** - APPA developed the Thought Leaders Series to conduct dedicated discussions on the future of higher education and the impact of that future on educational facilities. Since 2006, the annual Thought Leaders symposium and resulting monograph have addressed a variety of topics related to higher education and affecting the campus built environment. APPA's Thought Leaders program is a component of the Center for Facilities Research (CFaR). The annual Thought Leaders symposium convenes representatives of colleges and universities from across the United States and Canada alongside association leaders, industry consultants, and education experts. The 2017 topic is Transforming Facilities to Achieve Student Success. All Thought Leader reports can be downloaded from the APPA website for free, thanks to the generosity of sponsors.

## Annual Meetings Committee

**Matt Yench, Vice President**

Skepton Construction, Inc.



### The ERAPPA Annual Meetings Host Committee Chairs/Co-Chairs are:

<b>John O'Shaughnessy</b>	St. Paul's School	NNECERAPPA (2018)
<b>Connie Simmons</b>	Phillips Exeter Academy	NNECERAPPA (2018)
<b>Beth Clark</b>	Penn State University	KAPPA (2019)
<b>Peter Buchheit</b>	University of Pittsburgh	KAPPA (2019)
<b>Greg Clayton</b>	University of Prince Edward Island	AAPPA (2020)
<b>Kevin Simpson</b>	University of New Brunswick	AAPPA (2020)

The ERAPPA Annual Meetings Committee (AMC) consists of the Vice President for Annual Meetings and the Chair or Co-Chairs for all established host committees of the current and future ERAPPA Annual Meetings. The AMC meets twice per year – at the ERAPPA Mid-Year Meeting and the ERAPPA Annual Meeting – to review broad issues that may affect several host committees (changes to the Annual Meeting Guide or budget template, for example).

Additionally, the Vice President for Annual Meetings joins each individual host committee's regularly scheduled meetings (typically by conference call) to remain engaged in each year's planning process. The Vice President for Annual Meetings serves as the liaison between the ERAPPA Board and all active host committees.

### Registration System:

For the 2018 Annual Meeting, and going forward, the host chapters will be using a new APPA registration system. This new system is will simplify the registration process and the associated programming of details that go along with it.

## Treasurer's Report

Arthur Walsh, Treasurer

Dalhousie University



### ERAPPA Year-End Treasurer's Report July 1, 2016 – June 30, 2017

The 2016-2017 fiscal year resulted in a net financial loss in the amount of \$112,091. This is 6% less than the \$119,800 loss budgeted.

Revenue from membership dues was just 2.5% less than budgeted, while the 2016 Annual Meeting held in Niagara Falls, ON generated a surplus 2.4% over budget. Combined, revenue was 99.6% of the budget amount.

As budgeted and planned, ERAPPA made a significant investment in our membership, awarding over \$73,000 of credentialing scholarships.

Five chapters were able to take advantage of the Partner's in Education funding available, with grants of \$2,000 each awarded, one more than budgeted.

Accounting fees are for the services provided by our Certified Public Accountants firm Novak|Francella for the auditing of the financial records for the year ending June 30, 2017 and the preparation and filing of the federally required annual 990 return.

Accounts payables largely consist of regular educational scholarships awarded, but not yet claimed, and accounting fees for services relating to the period ending June 30, 2017. Prepaid scholarships consists of credentialing "coupons" purchased from APPA, but not yet redeemed at year-end. The accounts receivable is higher than normal due to the late receipt of the 2016 Annual meeting proceeds, the balance consisting of seed funding loans advanced to future host committees.

The Mid-Year meeting, where much of the planning and work for the year is executed by the committees, continues to be, as budgeted, a significant expenditures with total expenses of \$105,691.

ERAPPA remains financially stable. At June 30, 2017 our cash balance was \$348,444 with prepaid expenses of \$10,050, accounts receivable of \$176,534 and accounts & scholarships payable amounting to \$45,674 for a net asset balance of \$489,354. This is a decrease in our net asset position of \$112,090 over June 30, 2016.

Although ERAPPA's current assets are decreased from those of last year, this is as budgeted and planned. While still retaining sufficient accumulated surpluses to protect the organization in the event of a financially unsuccessful annual meeting, ERAPPA was able to follow through on the educational commitments put forth in 2016-2017 operating budget.

<b>ERAPPA YEAR-END STATEMENT</b>			
<b>July 1, 2016 - June 30, 2017</b>			
<b>ITEM</b>	<b>BUDGET</b>	<b>Yr End TOTAL</b>	<b>Variance</b>
<b>REVENUE:</b>			
Interest	350.00	425.70	75.70
Dues	121,000.00	117,672.76	(3,327.24)
Annual Meeting Proceeds	96,213.00	98,559.98	2,346.98
<b>TOTAL REVENUE</b>	<b>217,563.00</b>	<b>216,658.44</b>	<b>(904.56)</b>
<b>OPERATING EXPENSES:</b>			
<b>VP Annual Meetings</b>			
Host Com Visits	1,900.00	381.25	1,518.75
Winter (Mid-Year) Meet - Co-hosts	8,000.00	5,103.95	2,896.05
<b>sub-total</b>	<b>9,900.00</b>	<b>5,485.20</b>	<b>4,414.80</b>
<b>VP Chapter Affairs</b>			
Winter (Mid-Year) Meet - CA Comm.	10,000.00	7,942.05	2,057.95
<b>sub-total</b>	<b>10,000.00</b>	<b>7,942.05</b>	<b>2,057.95</b>
<b>VP Membership</b>			
Winter (Mid-Year) Meet - Mem Comm.	11,000.00	6,032.69	4,967.31
Membership Initiative	4,000.00	4,072.74	(72.74)
<b>sub-total</b>	<b>15,000.00</b>	<b>10,105.43</b>	<b>4,894.57</b>
<b>Board - Administration</b>			
Miscellaneous	1,038.00	178.34	859.66
Travel- ERAPPA Annual Meeting	1,200.00	618.30	581.70
Travel - APPA Annual Meeting	6,000.00	4,937.06	1,062.94
Printing & Postage	600.00	1,102.56	(502.56)
Marketing	500.00		500.00
Insurance	4,400.00	3,759.15	640.85
Incorporation	30.00	25.00	5.00
Board Meet - Winter (Mid-Year) Meet	59,000.00	70,057.10	(11,057.10)
Board Meet - Summer	13,500.00	15,678.15	(2,178.15)
Board Meet - Annual	20,000.00	21,322.10	(1,322.10)
Bank Fees	650.00	844.97	(194.97)
Accounting Fees	14,500.00	11,330.00	3,170.00
Software Fees	325.00	350.85	(25.85)
Dues Collection Fees	12,100.00	11,767.28	332.72
Commissions & Service Fees	1,100.00	2,063.00	(963.00)
Ad-Hoc Meetings - Conference Calls	4,500.00	3,065.53	1,434.47
<b>sub-total</b>	<b>139,443.00</b>	<b>147,099.39</b>	<b>(7,656.39)</b>
<b>VP Technology-Communications</b>			
Web Review & Development	7,000.00	15,106.67	(8,106.67)
Winter (Mid-Year) Meet - T&C Comm.	11,000.00	8,219.52	2,780.48
ERAPPA Newsletter	1,000.00	1,025.27	(25.27)
<b>sub-total</b>	<b>19,000.00</b>	<b>24,351.46</b>	<b>(5,351.46)</b>
<b>Awards / Scholarships</b>			
Scholarships & Expenses	36,000.00	27,674.13	8,325.87
Credentialing Scholarship	79,500.00	73,200.00	6,300.00
Ambassador Scholarship Top-Up	1,000.00	-	1,000.00
Student Ambassador Scholarship	520.00	-	520.00
Awards	2,000.00	1,620.65	379.35
<b>sub-total</b>	<b>119,020.00</b>	<b>102,494.78</b>	<b>16,525.22</b>
<b>Professional Development</b>			
Misc. Prof Develop. Expenses	1,000.00	-	1,000.00
Partners-in-Education Support (PIE)	8,000.00	10,000.00	(2,000.00)
Winter (Mid-Year) Meet - PD Comm.	11,000.00	8,335.77	2,664.23
PD Webinar Expense	-	7,543.77	(7,543.77)
Toolkit Sponsorship at Annual Meeting	5,000.00	5,391.33	(391.33)
<b>sub-total</b>	<b>25,000.00</b>	<b>31,270.87</b>	<b>(6,270.87)</b>
<b>Expenses Total</b>	<b>337,363.00</b>	<b>328,749.18</b>	<b>8,613.82</b>
<b>NET</b>	<b>(119,800.00)</b>	<b>(112,090.74)</b>	<b>7,709.26</b>

## ERAPPA Proposed Budget Treasurer's Report July 1, 2017 – June 30, 2018

For the fiscal year 2017-2018 the ERAPPA Board is proposing an operating budget that will result in an in-year operating loss of \$91,980.

The budgeted revenue for membership dues represents the three-year average. As ERAPPA dues are a percentage of the APPA dues, any increase in APPA dues will result in an increase in ERAPPA dues. However, for the sixth consecutive fiscal year, the ERAPPA dues percentage itself will not increase.

ERAPPA's other primary source of revenue is the 50% share of the annual meeting surplus. The host committee determines the projected annual meeting net income. At the Mid-year meeting in Washington, DC the host committee projected a positive meeting surplus. However, due to increased costs based on location, a significant reduction in sponsorship, and the costs associated with the rescheduling of the Annual Meeting, currently the 2017 meeting is projected to breakeven only.

In this budget the Board continues to support continuing education for our members. However, due to the projected annual meeting financial results the number of educational scholarships awarded will be reduced to five, from the usual six. As well, while still committed to supporting the APPA credentialing program, the number and level of awards has also been reduced. In 2017-2018 ERAPPA will be awarding:

- 5 educational scholarships with a total value of \$24,000
- 44 CEF and 14 EFP 50% subsidized registration scholarships, with a combined value of \$15,250

Recognizing an impediment to some individuals being able to serve on the ERAPPA Board is the lack of institutional funding to attend meetings, this budget, consistent with previous budgets, maintains the inclusion of travel and accommodation expenses for Board members to attend the annual meeting.

The mid-year meeting continues to be a significant operational expense. However, the value of the work accomplished at this meeting by the committee members, representing every chapter, is validated every year through the delivery of exceptional annual meetings, and successfully obtaining the goals and objectives of the organization. Notwithstanding, given the significant anticipated decrease in revenue, the Board has reduced the budget for the Mid-Year meeting and will be working with the 2018 host committee to reduce and manage expenses.

At first review this budget can be unsettling, forecasting a deficit, while forgoing an opportunity to increase the membership dues rate. It is important to note, at the June 2017 Board meeting, the Board reviewed every line item in the budget, ensuring each expense item is required, managed and reasonable. The budget was again reviewed and adjusted at the Board meetings immediately preceding this annual meeting. The accumulated surpluses allowed for the maintenance of most of our usual programming and scholarships. This budget is one in a ten-year cycle, based on rotating meeting locations. Rest assured the Board is carefully managing and updating this 10-year budget cycle for you our members, safeguarding the financial stability of ERAPPA.

<b>ERAPPA BUDGET</b>		
<b>July 2017 - June 2018</b>		
<b>REVENUE</b>		
Interest - Savings Account	1,000	
Membership Dues	135,000	Gross Dues; 95% of 3 year avg
Annual Meeting Proceeds	-	Prev 9 year avg \$103,890; lasted hosted in 08-08 by MD/DC APPA \$61,089
Refund - ERAPPA Prog Support	-	Repayments are recorded against receivables and not actual revenue
	<b>Total Revenue</b>	<b>136,000</b>
<b>Operating Expense</b>		
<b>Annual Meetings</b>		
Expenses and Travel	5,600	8 committee members at \$700; 3 yr avg \$476 each
Host Committee Visits	1,900	no travel in 17-18; previous 3 year average \$1,907
	<b>sub-total</b>	<b>7,500</b>
<b>Chapter Affairs</b>		
Travel - Chapter Meetings	-	eliminated in 15-16, contact is made at MYM
Chapter Affairs Comm Mtg	7,000	10 @ \$700; 3 yr avg \$771 each
	<b>sub-total</b>	<b>7,000</b>
<b>Membership</b>		
Membership Comm Mtg	7,700	11 @ \$700; 3 yr Avg is \$593 each
ERAPPA Membership Initiative	2,000	Decreased by \$2,000
	<b>sub-total</b>	<b>9,700</b>
<b>Administrative/Governance</b>		
Miscellaneous expense	1,000	3 yr avg \$302
Travel - ERAPPA Annual Mtg	500	depends on location
Travel - APPA Annual Meeting	6,000	3 yr avg \$5,227; (3 attendees @ \$2,000)
ERAPPA meeting expense	-	has not been historically used; eliminated
Printing & Postage	1,200	3 yr avg \$1,024
Marketing	500	significant variance yr to yr
Insurance	4,000	3 yr avg \$3,716
Incorporation	30	\$25 fee plus \$5 processing
Board Meeting - Winter	34,300	3 yr avg \$55,450. (DC was higher due to location. Decision to reduce
Board Meeting - Summer	13,500	3 yr avg \$13,412.
Board Meeting - Annual	22,000	3 yr avg \$18,457; additional 18% based on 2017 location
Bank Fees	1,000	3 yr avg \$623; 16-17 was \$845
Accounting Fees	14,500	3 yr avg \$13,209
Software Fees	400	QuickBooks \$30/mth
Dues collection (APPA)	13,500	10% of dues
Commission & Service Fees (Travel)	3,500	3 yr avg \$3,593
Tele-Conference	4,500	3 yr avg \$3,595
	<b>sub-total</b>	<b>120,430</b>
<b>Technology &amp; Communication</b>		
Web Review & Development	8,000	3 yr avg \$9,113; increase due to Ogosense Methodology & upgrades
Dropbox - Professional	1,200	\$100/member/year
Technology & Comm Mtg	7,700	11 @ \$700; 3 yr avg \$593 each
ERAPPA Communication	1,500	3 yr avg \$2,441; based on 16-17 actual
	<b>sub-total</b>	<b>18,400</b>
<b>Awards/Scholarships</b>		
Scholarships - Leadership Acad.	20,000	est (\$1,500 tuition + \$2,500 exp) 5 scholarships
Credentialing Scholarship	15,250	44 CEFP @ 50% of \$550, 14 EFP @ 50% of \$450
Ambassador Scholarship Top-up	500	New in 14-15 covering gap in Sponsor & Actual cost, not used last 3 yrs
Student Ambassador scholarship	-	eliminated; conference sponsorship opportunity
Awards	2,000	3 yr avg \$1,633
	<b>sub-total</b>	<b>37,750</b>
<b>Professional Development</b>		
Misc P.D. Program Expenses	500	3 yr avg \$292
Major Update of PD Materials	-	request when needed
Partners in Education Support	8,000	Ongoing support for speakers at Chapter meetings; 3 yr avg \$6,666
Professional Development Mtg	7,700	11 @ \$700; 3 yr avg \$695 each
Webinars	6,000	\$1,500 each; 4 per year
Toolkit sponsorship at Annual Meet	5,000	
ERAPPA A/M "Seed" Funding	-	provided and recorded as a loan, so not an actual expense
	<b>sub-total</b>	<b>27,200</b>
	<b>Total Operating Expense</b>	<b>227,980</b>
<b>Net</b>	<b>(91,980)</b>	

## Business Partner Liaison Report

Amy Baker

Parette Somjen Architects



### Committee Structure:

Business Partner Representatives may be appointed by local Presidents that represent each of the active Chapters that Comprise the Eastern Region of APPA. Incoming presidents may choose to appoint a new Business Partner Representative at their discretion, or to continue with the representative that currently holds the position, or as specifically defined through local chapter by-laws. *NOTE: Committee structure is being better-defined and is currently under review by the committee for approval by the Board. This includes establishing term limits for all members.*

### The ERAPPA Business Partner Representatives for 2016/17 are:

Amy Baker	New Jersey Chapter	NJAPPA
Leslie Whitby	Delaware Valley Chapter	DVAPPA
Kari Miller	Keystone Chapter	KAPPA
Larry Fitzgerald/ James Bruno	Northern New England Chapter	NNECERAPPA
Tracey Hartord/ Vance Freymann	Southern New England Chapter	SNEAPPA

### We currently have vacancies for the following chapters:

OCFMA | NYAPPA | AAPP | MD/DCAPPA | OAPPA

### Chairperson:

The Chairperson of the Business Partner Committee is appointed by the ERAPPA incoming President and may remain Chairperson for up to 4, 1-year terms, if so deemed by the new incoming President.

The Chairperson is a non-voting member of the ERAPPA Board, who acts in the capacity of a liaison to provide current information on behalf of the BP membership, and is responsible for communicating Board initiatives that impact ERAPPA BP Membership to the members-at-large.

The Chairperson may remain as a member of the committee after their term expires, for the purpose of information sharing and continuity (similar to the role of a past-president). *NOTE: Committee structure is being better-defined and is currently under review by the committee for approval by the Board. This includes establishing term limits for all members.*

### Charge:

The role of the Business Partner Advisory Committee is to identify and promote effective means of communication and support between ERAPPA Business Partners and ERAPPA Institutional Members to build and enhance mutually beneficial relationships. The Committee seeks to continually evaluate, validate and promote the benefits of an ERAPPA membership and the value that participation can bring to members of the business partner community. To accomplish this charge, the Committee encourages and receives feedback from all Business Partners supporting ERAPPA and its various regions.

Additionally, the Committee strives to offer creative thinking and innovative ideas that support the purpose and values of the Eastern Regional Chapter of APPA.

#### **Expectations & Responsibilities of Committee Members:**

Each Committee representative should begin and continue their role with a passion for the work of the Committee, and provide support for the Chairperson and other Committee members alike. As with other ERAPPA committees, there is the expectation of full participation, to the maximum extent possible, in Committee meetings, held six (6) times each year. Within its six meetings, one face-to-face meeting will be held in conjunction with ERAPPA's Annual Conference and Exhibition. The remaining meetings will be held via conference call. If for some reason the committee member is unable to attend meetings, he or she should arrange for a suitable substitute (including from within their own business organization) and if that option is not available, then arrange with the local chapter board president for a substitute attendee to be selected to ensure a balance of representation and continued flow of information to the Committee and the local chapter board. Each committee member should attend their local chapter meetings and regional annual meeting, and provide routine feedback to their boards on the activities, actions, and initiatives of ERAPPA's Business Partner Committee.

#### **Committee Initiatives:**

*Business Partner Best Practices:* As business partners, we have the ability to be key-contributors to the professional development of our institutional members. It is our mission to promote professionalism and provide guidance to new business partner members, so that they embrace ERAPPA's overall vision designed to understand the needs of its members, be a key resource for their professional development and inspire them to reach full potential as facilities management professionals.

*Business Partner Membership Benefits:* This was identified by the 2017 Host Committee, and further discussed during the Mid-Year Meeting, as being a very important tool that required development. This is always a question when business partners are registering for the annual conference... "What are the benefits of becoming an ERAPPA member?" Beyond the obvious networking and camaraderie experienced at the conference, we identified a need for tangible, meaningful benefits. The committee defined a strong list of benefits, and the Board provided very positive feedback. The list requires official Board approval. Target roll-out for a final list of BP membership benefits is planned for the 2018 Host Committee.

*Webinars:* The Business Partner Committee has been charged with development and implementation of the "ERAPPA Webinar Lunch and Learn Series." This outlet brings, innovative and informative best practices to our institutional members throughout the year. The program kicked-off in September 2016 with bi-monthly offerings, on a trial basis. During the June 2017 Strategic Planning Meeting, the benefits of the program were evaluated, and it was determined by the Board to continue the program. It was further determined, that due to the volume of work associated with the planning of this effort, sessions would be scheduled quarterly, in August, November, February and June, to allow adequate time to evaluate content, select presenters and provide training. There is desire to hold a perpetual "Call for Papers" to be located within the "members only" section of the ERAPPA Website. Discussions regarding this process will continue into 2018 with the incoming VP of Technology and Communications. Presenters are currently booked through May 2018. Review of sessions will take place at the 2018 Strategic Planning Meeting.



## APPA Professional Affairs Committee

John Michalewicz

University of Hartford  
and

## APPA Awards and Recognition Committee

Elizabeth Clark

Penn State University



The APPA Professional Affairs Committee and Awards and Recognition Committee now operate as a joint Professional Affairs Committee with double representation from each APPA region. The joint committee works each year to review the individual and institutions award applications that are made to APPA every November 30<sup>th</sup>. The delineation of responsibilities for the Award Year 2017 (applications submitted by November 30, 2016) were:

### Professional Affairs

- Award for Facilities Excellence
- Sustainability Award
- APPA Fellow Award

### Awards & Recognition

- Effective & Innovative Practices Award
- Pacesetter Award
- Meritorious Service Award

Members of the joint committee met in Tucson, AZ on the campus of the University of Arizona during the last weekend of January 2017 to review, discuss, and make recommendations to the APPA Board with regard to those individuals and institutions the joint committee felt were deserving of the award for which they had applied or been nominated.

The exception to this was the Award for Excellence. From the four applications received, it was determined that two institutions warranted on-campus visits to see whether that which would be observed in person was congruent with that information contained in each written application. Two site visit teams were formed:

### University of Colorado Anschutz Medical Campus

- Marion Bracy (Xavier University of Louisiana) – Team Lead
- Beth Clark (Penn State University)
- Heather Hargrave (Tulane University)
- Doug Laditka (College of Wooster)

### Universidad de Panamericana Mexico City Campus

- Ron Tarbutton (Oklahoma State University) – Team Lead
- EJ Hook (University of Montana)
- John Michalewicz (University of Hartford)
- Luis Rocha (University of Arizona)

The campus visits were conducted concurrently during the last week of March and each served to validate the information presented in the institutions' application. Each institution was subsequently given APPA's Award for Facilities Excellence at the July 2017 APPA Annual Conference in San Francisco, CA.

APPA Awards of note for the Eastern Region include the Effective & Innovative Practices Award to Penn State University for their cohort approach to APPA credentialing preparation, the Pacesetter Award to Julius R. Williams (University of Maryland), and the Meritorious Service Award to Keith Woodward (Quinnipiac University).

At the close of the 2017 Awards cycle, the joint committee reviewed, revised, and rolled out a revamped Sustainability Award. Now called the "Sustainability Innovation Award," this new award no longer has ties to the Association for the Advancement of Sustainability in Higher Education (AASHE)'s Sustainability Tracking, Assessment, and Rating System (STARS). The award now focuses on sustainability practices that display a high level of innovation and adaptability or transferability for implementation at other institutions. The award is score based on the following criteria: innovativeness, creativity, and originality; sustainability (economic, environmental, and societal benefits); adaptability and transferability; institutional and community benefit; management commitment and employee/student involvement; and documentation and analysis.

At the APPA Annual Conference in July, the APPA Board made the determination that the APPA Mentoring Program should reside with the Professional Affairs Committee. The committee is working to integrate this new responsibility with current responsibilities and initiatives. Current initiatives for the committee include:

- Military Transitions/Collaboration with military organizations (SAME, CEC)
- Collaboration with Construction Owners Association of America (COAA)
- Collaboration with International District Energy Association (IDEA)
- Compiling, categorizing, and communicating best practices from member institutions
- Continued contributions to Facilities Manager magazine

The committee will meet in Alexandria, VA, along with the rest of the APPA committees, during the first weekend of December. Combined and individual committee meetings will take place to advance the APPA organization's initiatives, the APPA president's platform, and the individual committees' agendas. The committee will meet to review, discuss, and make recommendations to the APPA Board with regard to individual and institutional awards (submission deadline November 30, 2017) during the last weekend of January at a location to be determined.

## APPA Membership Committee

George Stooks

Geneseo-State University of NY



### **ACCOMPLISHMENTS**

The Membership Committee started the year with continuation of the work with the APPA Office on the “Be a member, Get a member”. Most efforts in addition to this campaign were directed at retention of members that had not renewed. The APPA Office assisted the regions with phone calls directly to members that had yet to renew and those that were previously members but had dropped.

At the very end of the year and beginning of 2017 the focus of the APPA office was on the transfer to the new data management system. Since the start of the new calendar year, Kristin Witters, Director of Membership and Outreach shared the progress APPA has made in transferring to the new data management system and has been extremely supportive in helping membership liaisons across APPA in the use of the system.

As a means of spreading the APPA brand, first time attendees at the annual meeting in San Francisco received a compact tote bag which was a big hit. In addition, T-shirts were printed and sold with the APPA logo on the front and a “wordle”, which is a word cloud on the back displaying all of the regions. These items are all meant to spread the awareness of the APPA organization and the regions.

### **APPLICABILITY**

Membership retention and recruitment is vital to the organization. Sharing membership renewal information with the regions gives the committee members the opportunity to know where membership stands both in APPA and in our regions. Reports shared with our committee includes renewals, unpaid members and those dropped. Our ERAPPA is a strong but renewal rates and adding new members must be a priority and it takes the entire membership being part of recruiting to be successful.

### **INITIATIVES**

Placing a value on membership usually comes down to dollars and cents. In other words, when balancing a budget and membership dues are in front of our financial folks it is sometimes difficult to get approval. The APPA Membership Committee continues to explore a more direct means of face to face time with CFO's. At the meeting in Washington DC in December 2016 we explored the option of attendance for key representatives from APPA at the NACUBOA conference in order to share the value of membership with CFO's at the educational institutions. We expect an update on this at the December 2017 meeting.

Our new APPA VP for Membership, Tony Guerrero from the University of Washington Bothell took office at the national APPA meeting in San Francisco this past July. In addition to retention and working at getting past members back into an active status, recent membership conference calls have focused on a more assertive plan for recruiting. Goals are to grow member engagement outside of the passive approach of receiving the magazine and/or updates electronically. The value of face to face interaction provided at drive in workshops, recruiting first time attendees at regional meetings and the supervisor tool kits are all opportunities to be more assertive. Focusing on potential members that are just entering the field and looking to advance themselves is an excellent opportunity to share the career value of APPA and ERAPPA membership and educational offerings

**EFFECTIVENESS**

Higher education within the region and beyond has experienced budget challenges and the drop off in membership is most likely a result of this.

Since 2016 we have seen a drop in membership from the 4 year colleges of 22 campuses. Fortunately, new members from other sectors mitigate this but with everything included our membership since 2016 has dropped from 268 to 258.

Now more than ever we need a concentrated effort at the chapter level. The single most important contribution would be to see a concentrated effort for each ERAPPA chapter to commit to member recruitment. It is at these times of restricted budget we need to work smarter and what better resources are there than the APPA education series for existing and new members

The APPA board is taking an "All hands on deck" approach to this issue. The ERAPPA Board can assist through continued effort to have state chapters appoint ERAPPA Membership committee members who think freely and share their excellent ideas. As the liaison to the APPA Membership Committee I will work diligently with the APPA office to continually push down data that assists the chapters in identifying dropped members and those that have never been members. Our ERAPPA Membership Committee provides me with ideas, and initiatives that I share with the APPA Committee. There are similar efforts in other regions that make this a two-way street back through the APPA membership committee.

Together we can, together we must turn this tide and grow our membership.

## APPA Emerging Professionals Committee

Jessica Abbott

University of Hartford



The Emerging Professionals Summit occurred on Thursday July 20<sup>th</sup> 2017 during the APPA/PCAPPA/BayAPPA 2017 Annual Meeting & Exhibition in San Francisco, California. The Emerging Professionals Summit participants spent the morning discussing work styles and habits in an effort to look past generational stereotypes of Millennials, Gen Xers, and Baby Boomers. During group discussions, it was discovered that no one fits perfectly into a generational box; therefore bringing too many preconceived notions about different generations into the workplace isn't going to be effective.

The following session, titled The Outward Mindset Organization, encouraged participants to consider the needs of others in both workplace and personal interactions. When acting from an inward mindset, people focus on themselves and their own objectives and they want others to behave in ways that will further those objectives. Conversely, when action from an outward mindset, people work to help others be successful and measure their success in terms of what others are able to accomplish as a result of their efforts. All participants were challenged to reach out to someone they had an inward mindset toward that likely also had an inward mindset towards them as well in order to clear the air and break the colluding cycle to work towards an outward mindset.

The last session of the day was about diversity and inclusivity and all of the participants took a 20 minute tour of the hotel while trying to put themselves in other people's shoes and identify potential barriers for some customers. After debriefing from this activity, EP Summit attendees were encouraged to try this activity back on their campuses to identify any spaces that may be preventing inclusivity.

Emerging Professionals are now starting to be called APPA Young Professionals (AYP) instead, defined as someone who has recently begun a career in the field of Facilities Management and is approximately 35 year of age or younger. AYPs are encouraged to attend professional development programs in their region and through APPA (Drive-In Workshops, Supervisor's Toolkit, APPA U, Chapter, & Regional Meetings), as well as become a mentee through APPA's mentoring program in order to grow their roots and their career.

## APPA Information and Research Committee

Dan Gearan  
New England College



The Information and Research Committee has a key role in fostering the growth and dissemination of the collective body of knowledge that elevates the role of educational facilities professionals.

ERAPPA Continues to be well represented on the committee. In addition to Dan Gearan the ERAPPA Representative, Darryl Boyce serves as an At-Large member and Norm Young Chairs the committee as the APPA Vice President for Information & Research.

Highlights of this year's activities:

### 1. Association Management System Upgrade (AMS, CMS, LMS)

APPA staff members are engaged in a significant undertaking to update the APPA Association Management System (a computer system used by professional associations to run their organization). The AMS will eventually be coupled with a new content management (CMS) and learning management (LMS) system with the goal of enhancing staff service capabilities and member's on-line experience.

The I&R committee has reviewed content available through the APPA WEB site and provided information to APPA staff on likes, dislikes, and needed changes regarding the type of content available, the navigation within the site to acquire content, and any additional or new content that may be desired by the membership at large.

### 2. The Body of Knowledge (BOK)

The BOK offers foundational content required by facilities professionals at colleges, universities, schools, museums, and other nonprofit, educational organizations. The BOK supports APPA training and credentialing.

Two new content coordinators are in place: Brad Boser, director at Southern Alberta Institute of Technology will be taking over duties for Part 1, General Administration and Management. Emmet Boyle, director, maintenance & utilities at the University of Regina, will be replacing ERAPPA's Darryl Boyce as content coordinator for Part 3, Energy, Utilities, and Environmental Stewardship

All sections are now updated on an annual basis.

### 3. Green Revolving Investment Tracking System (GRITS)

A project-management web tool that allows users to track and analyze the energy, financial, and carbon savings data from their energy- and resource-efficiency projects, as well as access to a Library of more than 1,400 projects completed by other GRITS users across the U.S. and Canada. Over 300 APPA Institutional members are using GRITS.

The Sustainable Endowments Institute (SEI) and APPA launched a partnership that provides all APPA members with free access to the Green Revolving Investment Tracking System (GRITS).

### 4. Center for Facilities Research (CFaR)

Advances the knowledge of Facilities Management through research, discovery and innovation.

CFaR Projects:

Peer review completed and final report accepted; CFaR Research Award will be presented at APPA 2017:

- Roberson: “Aligning Facilities Management with an Organization’s Core Business” Peer review complete but waiting for final report to be submitted:
- Prakash: “Assessment of Competencies Required for Facilities Management of Educational Institutions”

Nearly completed and soon to go to peer review:

- Karanja/Mayo: “Standards of Practice for Facility Condition Assessments (FCA)”
- Haubold/Reynolds: “Issues with Recovery and Recharge in Higher Education”

In process and expanded under APPA’s Standards and Codes Council activity:

- Christensen/Thierner: “Total Cost of Ownership”

Research still in process:

- Han/Cain/Medlin/Wagner: “Update: The Impact of Facilities on the Recruitment and Retention of Students”

Several queries received from potential researchers; still to be assessed for CFaR.

The I&R committee is working with the leadership of the Thought Leader Series (TLS) to capture potential research topics and to disseminate them to APPA members and business partners. Presentations were held at each of the regional conferences to highlight the latest TLS and to tie the content of the TLS to potential research through CFaR.

- The committee is working with the Professional Affairs and Awards Committees to help qualify the research submitted for consideration in applying for the APPA Fellow designation.

#### **4. The Facilities Performance Indicators (FPI)**

Allows members to capture, track and benchmark the vital data needed to measure operations and performance, identify capital asset realities, and lead a successful facilities strategy.

290 member institutions participated in the most recent survey. NACUBO collaborated with APPA to post sustainability-related questions on our FPI site for its members. Over 450 institutions participated in this survey. The Informatics Work Group and others are working to determine the future direction of the FPI, streamlining questions and process, and automating more data collection via interfaces with CMMS programs.

#### **5. Publications**

Over 1000 publications are available through APPA’s Bookstore. Recent updates and additions include: Environmental Management Guide for Educational Facilities (co-publication with the Campus Safety & Environmental Health Association), and The Building Commissioning Handbook, third ed. (co-publication with the Building Commissioning Association) Works in progress include: Operational Guidelines Trilogy revision, Creating a Service Culture, second ed. , Critical Issues in Facilities Management Series –

Working on several topical anthologies, such as space management, leadership, and sustainability, Campus sustainability Case Studies: In early development.

#### **6. The Rex Dillow Award for Outstanding Article in Facilities Manager**

Rex Dillow, for whom this award is named, passed away this year, but his legacy lives on through this award. “Eligible articles are those written by a full-time employee, from any department, of an APPA member institution. In addition, articles written by APPA Members Emeritus who are not affiliated with a business partner firm may be eligible for award consideration. If an article has more than one listed author, all authors must be full-time employees of an APPA member institution or a Member Emeritus to be eligible for the award. Eligible institutions must be Institutional or Affiliate members at the time of publication.”

The recipient of the 2017 Rex Dillow Award is Ryan Kmetz, sustainability coordinator at Christopher Newport University in Newport News, VA for his article “Designing a Resilient Campus”.

#### **7. APPA Student Internship Program Development**

A new initiative to develop an APPA internship providing practical experience, knowledge sharing, awareness of opportunities in education facilities, and an early introduction to APPA.

Kristie Kowall is forming and will lead an APPA Student Internship Program Task Force to develop a program grown from many initiatives related to emerging professionals.

The task force will report to I&R and meetings started in the Summer of 2017.



## APPA Professional Development Committee

Kevin Simpson

University of New Brunswick



### **ACCOMPLISHMENTS**

The implementation of the CEFP and EFP programs across the national level continues to be the biggest accomplishment for APPA Professional Development. Until last year, APPA struggled to get any movement on this initiative. The program was first developed in 2007. However, the past two years have been a huge success. They have more individuals going through this program than ever before. The success of the program is a combination of regional chapters advertising to their membership the benefits of the CEFP and EFP program along with regional chapters providing financial help to make it affordable for members to take the program. In July, we just surpassed 1000 individuals who had registered and received their CEFP or EFP in Facilities. All in all, this is a big accomplishment for the PD committee and a lot of hard work has been done by individuals across the APPA level.

The second initiative that the PD committee continues to work on is the success of the Emerging Professionals Summit and Senior Facilities Officer summits. These summits take place the day before the APPA annual conference. The first EP and SFO was held in Chicago, Illinois over two years ago. The one day session continues to be a huge success and has allowed individuals to meet other like-minded people across other institutions in a small, more collaborative setting. This is an initiative that seems to be gaining steam and will continue to be a large component of the APPA annual conference each year. As we look towards the future, the hope is to bring this summit to the regional levels in order that people can have this similar experience.

Finally, a new educational offering (Navigating the Facilities Portfolio) has been established that focuses on individuals that have graduated from the Leadership Academy or the Institute. This APPA U graduate program is the next level of professional development for senior individuals. The program is designed to allow for one on one conversational learning along with networking and sharing resources with other colleagues from across North America.

### **APPLICABILITY**

At this point, the biggest impact these accomplishments have had at the regional level continues to be with the CEFP and EFP programs. With ERAPPA providing sponsorship for individuals to take the CEFP and EFP at no cost, many members are taking advantage of this offer. The ability to take this high level course at no expense to respective institutions has encouraged members to challenge themselves and to see how they compare against their peers. Many have chosen to do the program in groups and are working together to ensure everyone is successful.

There continues to be discussion at APPA with implementing the Emerging Professionals Summit and Senior Facilities Officer summit to the regional level. This initiative has not been completed at this level to date, however, conversations continue to be had as to the value that would be gained and if it would be possible.

## **INITIATIVES**

The biggest initiative that professional development has this coming year is to try and encourage those that have graduated from the Leadership Academy or the Institute to consider attending the APPA U graduate program. At this time, a lot of members that have finished these two programs don't realize that there is a new program that is designed for them. This program is led by senior facilities personnel and they would gain valuable knowledge from attending such an event.

The Professional development committee continues to try and connect with new and existing members on a personal level. APPA has found that new members have a large appetite for educational training related to facilities management. In most cases, members attend one APPA conference or a regional conference and we don't personally connect with these members to provide them with information on educational offerings. Therefore, the PD committee initiatives stem around adding that personal touch to members that include the following:

- Sending a follow-up email to new members or existing members that take toolkit or another program. This will include highlighting other educational opportunities that exist within the APPA structure and communicating to them the scholarship opportunities that also exist.
- Send an email to all first time reception attendees regarding professional development opportunities that exist nationally as well as in there region. This includes sending a follow-up email within a week of the reception and another one shortly after, within a month. This will show these members that APPA cares about their facilities journey and wants to assist in assuring that they are well equipped for future success in higher education.
- The PD committee feels that the Inside APPA newsletter is a perfect communication tool that allows members to see the value in APPA. Over the next year, our goal would be to get more individuals registered to receive the magazine in the hopes that they will be encouraged to attend a professional development course or attend a chapter meeting.

## **EFFECTIVENESS**

There still is a need from ERAPPA membership and other ERAPPA PD committee reps for names of those who are attending local chapter meetings or taking course offerings provided by the local chapter. In order for APPA PD to have that personal touch, we need local representatives to be sending names through to myself to ensure that follow-up emails or phone calls can be made. We need to work together to ensure that our membership is fully aware of the course offerings and conferences that exist within APPA, ERAPPA, and there local chapter. If this piece doesn't happen, all initiatives above will not be successful.

## Atlantic Provinces Chapter

### AAPPA

*Greg Clayton, Chapter President*  
University of Prince Edward Island



### 1. The Leadership

President	<b>Greg Clayton</b>	University of Prince Edward Island
VP Professional Development	<b>Kevin Simpson</b>	University of New Brunswick
VP Membership and Treasurer	<b>Marina Clayton-Theriault</b>	Dalhousie University
VP Communications Technology & Secretary	<b>Craig Hickey</b>	University of New Brunswick

### 2. Chapter Governance

AAPPA By-Laws, modeled after those of ERAPPA, were adopted in 2003 and can be found on our website which is located at [www.erappa.org/AAPPA](http://www.erappa.org/AAPPA). Revisions to the AAPPA bylaws were approved at the 2015 Spring Business Meeting.

In May 2016, Marina Clayton-Theriault was elected VP Membership and Treasurer, replacing Marcel Falkenham.

### 3. Chapter Events in 2016-2017

**2016 AAPPA Annual Conference.** With over 90 attendees, representing institutional members and business partners, the annual fall conference was once again a huge success. It was held at the Delta Halifax Hotel located in downtown Halifax, and featured a keynote speaker as well as a day and a half of educational sessions offered through three tracks. As well, immediately preceding the conference, AAPPA offered the Supervisor Toolkit to over 20 chapter members. The delivery of this program locally, combined with AAPPA subsidizing the tuition, made for a highly successful, accessible and affordable educational offering to our members.

**2017 Spring Business Meeting** - The annual Spring Business Meeting was held this past May at the University of New Brunswick.

### 4. Meetings Planned for 2017-2018

**2017 Professional Development Conference.** The Fall Professional Development Conference will be held in Halifax, Nova Scotia on November 23-24, 2017. The keynote speaker and track presentations are currently being reviewed and final selections will be made soon. In addition to the conference, AAPPA is very pleased to be able to offer to our chapter members, the Leadership Academy Track 1 this year. It will be presented immediately preceding the conference from November 20 – 22<sup>nd</sup> in Halifax, Nova Scotia. The local delivery of this program ties into both AAPPA's and ERAPPA's strategic goals of making educational opportunities accessible to our members. Once again AAPPA will offer a tuition subsidy to assist in defraying the cost to delegates to this program.

**2018 Spring Business Meeting** - The 2018 spring business meeting will be held at Mt. Allison University, Sackville NB, during the month of May.

## 5. Membership

**No Fee Spring Meeting** - At this time there is no requirement for our institutions to pay a registration fee to attend the spring meetings. This is possible due to the generous support from our host institutions and business partners.

## 6. Scholarships

AAPPA provides educational support to our members by including \$5,000 APPA Program tuition subsidy in our operating budget. This subsidy is applied to the cost to host the APPA Leadership Academy program to reduce the registration cost per delegate.

## 7. Awards and Recognition

No awards or recognitions to report this year.

## 8. Major Initiatives

AAPPA began organizing ERAPPA 2020 and have selected a site and co-chairs for the conference.

AAPPA will be hosting APPA's Supervisors Toolkit this fall.

Executive met in the spring to review the strategic plan for the chapter, and aligning this year's goals to the strategic plan.

## 9. Major Areas of Concern

No major concerns to report this year.

## 10. Finances and Chapter Dues

**The AAPPA financial position** remained strong at year-ended March 31, 2017. As the chapter does not collect membership dues, the only source of revenue was that generated through the fall professional development conference and APPA Leadership Training programs. AAPPA expenses were primarily those associated with the fall professional development as well as board meeting expenses, website renewal and bank fees. AAPPA's current retained equity was largely realized through hosting the ERAPPA 2011 Annual Conference. Our long-term financial plan is to draw down this retained equity to deliver and support professional development within our chapter. It is anticipated at this rate there will remain sufficient working capital for when we next host the ERAPPA annual conference, at which time we will replenish our equity for the purpose of continuing our professional development mandate.

## 11. Event Formats and Costs

**The Annual Spring Business Meeting** is held over two consecutive half days and is hosted by a chapter institution. The first day includes a business meeting, working lunch, and informational presentations, followed by a campus tour. The second day consists of additional informational presentations followed by roundtable discussions and a tour of a local attraction. Costs are borne by the host institution and/or through corporate sponsorship, as there are no registration fees.

**The Fall Professional Development Conference** is held in Halifax over two consecutive half days (noon-5PM and 8 AM–noon) minimizing delegate attendance costs, requiring only one overnight, but still providing an opportunity for an evening banquet and networking. The first day is comprised of a keynote speaker and breakout sessions followed by a dinner that evening for attendees and guests. The morning of the second day included breakout sessions and roundtable discussions. Costs include the usual: professional speaker (including travel/accommodations), venue, AV rental, food, and attendee conference kits. The registration fee for institutional members was \$200 per delegate in 2016.

## **12. Business Partner Relationships**

Business Partners can attend the fall conference and are welcome to sit in on the training sessions as well as attend the evening dinner to enhance networking opportunities. There is no Hall of Resources at the fall conference.

The sponsorship fee for the fall conference in 2016 was \$1,300.

## Delaware Valley Chapter DVAPPA

Dawn Barnett, Chapter President  
Cabrini University



### 1. Chapter Leadership

President	Dawn Barnett	Cabrini University
Vice President	Jeff Brown	Immaculata University
Secretary	Jon Brighton	Temple University
Treasurer	Amber Donato	Moravian College
Immediate Past President	Michael Patterson	Bucknell University
Past President	Matthew Yencha	Cedar Crest College
Professional Development	Tim Korn	Muhlenberg College
Membership	Andy Feick	Temple University
Technology & Communications	David Rabold	Muhlenberg College
Webmaster	David Rabold	Muhlenberg College
Business Partner Liaison	Leslie Whitby	Stantec

### 2. Chapter Governance

Early in 2017 the vacant Treasurer position was filled by Jaime Garrido (Montgomery County Community College). Unfortunately, Jaime resigned in March to accept a position outside of our region. During his brief tenure, Jaime created a standardized treasurers report for monthly board review that was very well received. Ben Suplick, the past President of DVAPPA at the time graciously volunteered to temporarily fill the Treasurer position until the Board identified a replacement. Board Secretary, Sean Ounan (Temple University) also resigned in March of this year due to personal obligations.

As part of DVAPPA's bi-annual election process, the following individuals were nominated in May to fill Board positions for the next two years:

Dawn Barnett (President), Jon Brighton (Secretary), Amber Donato (Treasurer), Leslie Whitby (Business Partner Liaison to replaced Jessica Slack whose term ended) and Jason VanBuren (Vice President). The nominees were presented to the Chapter membership and installed to serve two-year terms at the June Chapter meeting at the Shipley School.

Shortly after the installation of the new Board, Jason VanBuren departed Ursinus College and submitted his resignation as Vice President. Fortunately, the Board was able to identify another candidate, Jeff Brown (Immaculata University), who was submitted to the Board and appointed to the vacant Vice President position.

### 3. Chapter Events

DVAPPA partnered with KAPPA, April 11-12, 2017 for a Spring Meeting at the Lancaster County Convention Center. The keynote speaker, Tracy Jones, a former Air Force officer and Gulf War

veteran, presented “A Message to Millennials” which were then followed by three informative educational sessions:

1. Incorporating Campus Energy & Environmental Concerns in Historic Buildings
2. Design Strategies for Advanced Environments
3. Sustainability for Student Housing

The Shipley School hosted the annual Summer Meeting, June 21, 2017. A short business meeting was conducted first, which included Board elections/installation. Following the business meeting, an educational session was conducted that focused on the transformation of the Shipley School buildings and grounds over a ten to fifteen-year period through an evolving master planning process. The presentation was very well received and followed by a tour of their beautiful campus.

#### 4. Chapter Events Planned 2017

Tentatively the fall meeting is scheduled to take place October 4, 2017 at the Valley Forge Casino Hotel. We hope to engage Michael B. Cowley from CE Maintenance Solutions to give a presentation on benchmarking and KPIs. This mid-afternoon meeting will be followed by a social event for Chapter institutional members and business partners.

- Holiday Social, January 2018 –TBD
- Winter Meeting, February 2018 – TBD
- Spring Meeting, April 2018 - TBD

#### 5. Membership

**Institutional Membership:** The Chapter’s 2016-2017 Institutional membership is currently at 67 total members. In an attempt to gain more institutional members, the DVAPPA Board voted to waive the institutional membership free. Educational institutions in eastern Pennsylvania and Delaware are now automatically considered members of the Chapter and just need to submit an application for inclusion on the Chapter’s membership listing. Since the change, the Chapter has three new institutional members.

**Business Partners Membership:** The Chapter’s business partner membership is currently at 66. The Chapter’s previous initiative, offering business partners the opportunity to obtain membership immediately (and bypass the waiting list) through recruitment of a new institutional member, is under revision due to the change that automatically admits all educational institutions within the Chapter’s area as members. A revised policy, that would encourage prospective business partners to reach out to institutional members and solicit their participation in Chapter events, is under consideration. Since the Chapter strives to maintain comparable institutional and business partner membership levels, and there is currently a significant business partner waiting list, identifying ways to increase institutional member participation is critical to being able to admit additional business partners to the Chapter.

## 6. Scholarships

The two \$2,500 DVAPPA scholarships, to cover expenditures related to tuition, hotel and/or travel for APPA educational events/programs, are available annually. The applications period is open through September 1<sup>st</sup> and applications can be found on the DVAPPA website.

DVAPPA awarded one \$2,500 scholarship to APPA's "Institute for Facilities Management" back in April 2017 and the awardee will take advantage of the scholarship this fall.

## 7. Major Initiatives

The Chapter remains committed to increasing institutional membership to foster improved collaboration, best practice sharing, while also offering increased exposure to business partners. With the addition of the Business Partner Liaison, the Chapter remains focused on increasing professional and social opportunities for all of our members. DVAPPA is actively seeking feedback from members and striving to accommodate programmatic requests. The Chapter is also working to gain an increased social media presence by working with younger members of the Chapter to achieve this goal.

## 8. Major Areas of Concern

Engaging new educational institutions, keeping the entire DVAPPA membership active and finding facilities professionals to serve in Chapter leadership roles remains a challenging goal.



## Keystone Chapter KAPPA

*Daniel Barlup, Chapter President*  
Penn State Harrisburg



### 1. Chapter Leadership

President	Daniel Barlup	Penn State Harrisburg
1st Vice President	James Miller	Washington & Jefferson
2 <sup>nd</sup> Vice President	Phillip Melnick	Penn State University Park
Past President	Andrew Wilson	Slippery Rock University
Treasurer	Thomas Thornton	Carnegie Mellon University
Secretary	Shannon Wetzel	Carnegie Mellon University
Director	Robert Unger	Pa State System of Higher Education
Director	George Papuga	Carnegie Mellon University
Director	Greg Black	Millersville University

#### ERAPPA Committee Representatives

Chapter Affairs	Daniel Barlup	Penn State Harrisburg
Prof. Development	Robert Unger	PASSHE
Membership	Andrew Wilson	Slippery Rock University
Technology	Rick Phillips	Penn State University Park

### 2. Chapter Governance

Nothing to report

### 3. Chapter Events

Board of Directors meetings are scheduled between our bi-annual meetings, and are used to plan the upcoming meetings and conduct organizational business to continue to better the chapter.

Spring 2017 meeting was held in Lancaster, Pa and was held in conjunction with DVAPPA we had over 230 attendees, we had a great Keynote message and conducted nine sessions on the second day of white paper presentations. The annual business meeting was conducted and new officers were elected.

The fall 2017 meeting is scheduled for September 27-28, 2017 in Altoona at the Blair county Convention Center. We will again be having a keynote speaker and nine educational sessions on the second day.

### 4. Chapter Events Planned 2018

Spring meeting to be held on April 17-18, 2018 at the Penn Stater in State College, Pa

## 5. Hosting for ERAPPA

The KAPPA board and ERAPPA 2019 committee is busy planning for another epic meeting to be held this time in Erie, Pa. The committee is excited to share our love of the area and demonstrate why you will not want to miss this exciting event.

## 6. Membership

We continue to have strong showings at our meetings, but are always encouraging new membership and offer a first time attendee scholarship for institutional meetings

## 7. Scholarships

Kappa offers the Norman H. Bedell Annual Scholarship towards the many professional development opportunities that Erappa and APPA offers. Awards are handed out at the annual meeting in the spring and the link to apply is on our web page.

## 8. Major Initiatives

**Membership:** The chapter continues to want to grow by gaining new institutional members and develop our business partner relationships.

**Educational Needs:** The Chapter continues to try and present valuable information and informative speakers to our members and is always on the lookout for a dynamic keynote presenter

## 9. Areas of Concern

Our chapter strives to keep our meetings affordable and show a tangible value in networking and education, we want the meetings to be a valuable use of time in this busy world. The chapter is looking for new and creative ways to engage our members and develop new relationships.

## MARYLAND-DC CHAPTER MD/DC APPA

*Sheri Vucci*, Chapter President  
Smithsonian Institution



### 1. Chapter Leadership

President	<b>Sheri Vucci</b>	Smithsonian Institution
President-Elect	<b>Julius Williams</b>	University of Maryland College Park
Past (Past) President	<b>Chuck Bagley</b>	University of Maryland College Park
Treasurer	<b>Douglas Fairley</b>	American University
Secretary	<b>Kelly Geishauser</b>	The Catholic University of America
Third Term Director	<b>Colleen Kirby</b>	Salisbury University
Third Term Director	<b>Gary Viola</b>	University of Maryland Baltimore
Second Term Director	<b>Mary Grube</b>	St. Mary's College of Maryland
Second Term Director	<b>Chris Vetick</b>	The Catholic University of America
First Term Director	<b>Jason Sawyer</b>	Smithsonian Institution
First Term Director	<b>Kenny Belton</b>	University of Maryland Eastern Shore

#### ERAPPA Committee Representatives

Chapter Affairs	<b>Sheri Vucci</b>	Smithsonian Institution
Professional Development	<b>Julius Williams</b>	University of Maryland College Park
Membership	<b>Nancy Yeroshefsky</b>	University of Maryland College Park
Technology	<b>Jason Sawyer</b>	Smithsonian Institution

#### APPA Committee Representatives

No Representatives

### 2. Chapter Governance

Bylaws were last revised June 2014. No changes since the last report.

### 3. Chapter Events July 2016-August 2017

#### Board of Director Meetings & Conference Calls

- Planning Meetings:
  - September 23, 2016 - Planning Meeting for Fall Program @ Smithsonian Environmental Research Lab
  - December 4-5, 2016 – Annual Planning Meeting @ Rocky Gap Lodge
  - February 19, 2017 - Planning Meeting for Spring Program @ Salisbury University
  - April 7, 2017 – Board Planning Meeting @ University of Maryland Baltimore
- Conference Calls (July 2016 to August 2017)
  - Monthly – noon on the first Monday of each month

**Fall 2016 Educational Program.** November 4, 2016 the Fall Educational Program was held at the Smithsonian Environmental Research Center. The meeting was well attended with approximately 70 participants. Topics included: “Running Track and Tennis Court Design and Maintenance!” and “Getting Everyone to the Table – Green Building Design and Maintenance.”

Chapter elections took place, electing two First Term Directors: Jason Sawyer/Smithsonian Institution and Kenny Belton/University of Maryland Eastern Shore. Doug Fairley/American University was elected as Treasurer and Julius Williams/UMCP was elected as President-Elect. Kevin Petersen left the Board after serving his term as President, along with many years of dedicated service to the chapter.

**NFM&T.** March 2016, the Chapter hosted a booth at the 2016 National Facilities Management & Technology Expo (NFM&T) in Baltimore, Maryland. This was a great opportunity for the Chapter to promote its local programming, the benefits of APPA membership, and the 2017 ERAPPA Annual Meeting.

**Spring 2017 Educational Program.** March 24, 2017, the Spring Educational Program was held at Salisbury University. Approximately 70 participants attended the meeting. Topics for the meeting were: “5 Methods to Reduce Fall Hazards and Risks),” “Green Roof Design and Care, and “Promoting Inclusive Diversity and Equity in Higher Education.”

**2017 Annual Two-Day Chapter Educational Program.** This was the Chapter’s 17<sup>th</sup> Annual Summer Program. Held June 15 and June 16, 2017, at the Rocky Gap Lodge in Cumberland, MD. The program was successful with approximately 103 registrants and thirteen business sponsors. Topics included: “Reliability Centered Maintenance – the Philosophy, Implementation and Results,” and “Personal and Professional Empowerment for Leaders.”

#### 4. Chapter Events Planned 2017-2018

**Fall Educational Program:** Maryland Institute College of Arts, scheduled for December 4, 2017; topics to be determined.

**Spring Educational Program:** Date and location TBD

**Annual Two-Day Educational Program.** June 14-15, 2018 – Date and Location TBD

#### 5. Hosting for Upcoming ERAPPA Conference

The MD/DC APPA Board is busily wrapping up planning for the 2017 ERAPPA annual conference October 29 through November 1, 2017 at the Omi Shoreham in Washington, DC. Sheri Vucci and Kelly Geishauser are co-chairs for the conference.

#### 6. Membership

Our Institutional Membership numbers are holding. We continue to work at recruiting new members including K-12 and community colleges.

## 7. Scholarships

Presently, three MD/DC scholarships are awarded each year, selected from the pool applicants generated by the ERAPPA scholarship process. Scholarships can be used for the APPA Institute, Leadership Academy, Supervisors Toolkit, and the APPA Credentialing Program.

## 8. Awards and Recognition

Julius Williams, University of Maryland College Park, received the “Pacesetter Award” at APPA’s 2017 Annual Conference.

## 9. Major Initiatives

**Membership.** The Chapter continues to develop membership by establishing personal contacts.

**Educational Needs.** The Chapter strives to provide meaningful educational topics for members and strives to be a resource for its members.

**Technology.** The Chapter worked on the development of a template for the annual meeting website and is using it for the first time for 2017.

## 10. Major Areas of Concern

None at this time

## NEW JERSEY CHAPTER NJAPPA

*Todd Miller, Chapter President*  
New Jersey Institute of Technology



### 1. Chapter Leadership

President	<b>Todd Miller</b>	New Jersey Institute of Technology
President-Elect	<b>Richard Stomber</b>	William Paterson University
Past (Past) President	<b>Charles Nieves</b>	New Jersey Institute of Technology
Director For Membership	<b>Richard Stomber</b>	William Paterson University
Director For Technology	<b>Jennifer Grimm</b>	Ocean County College
Director For Professional Development	<b>Joana Gonzalez</b>	Montclair State University
Treasurer	<b>Yohanna Alcantara</b>	Rutgers University
Secretary	<b>Steve Dubiago</b>	Rutgers University
Director at Large	<b>Lavone Broxton</b>	Montclair State University
Director at Large	<b>Mike Rica</b>	Rider University

#### ERAPPA Committee Representatives

Chapter Affairs	Todd Miller	New Jersey Institute of Technology
Vice President for Membership	Patty Smith	The College of New Jersey
Technology & Communications	Jennifer Grimm	Ocean County College
Vice President for Business Partners	Amy Baker	Parette Somjen Architects

#### APPA Committee Representatives

No Representatives

### 2. Chapter Governance

No changes since the last report.

### 3. Chapter Events 2017-2018

#### Board of Director Meetings & Conference Calls

- Planning Meetings:
  - September 28, 2017 - Planning Meeting for Fall General Membership Program @ Kean University
  - October 20, 2017 – Fall General Membership Meeting @ Kean University
  - April 18-20, 2018 – Spring Meeting @ Seaview Resort
- Conference Calls

- August 24, 2017
- November 9, 2017

**Spring 2017 Educational Program.** March 29-31, 2017, the Spring Educational Program was held at Stockton Seaview Hotel & Golf Club. Topics for the meeting were centered around the theme of “Creating Leaders Out of Followers”. The Keynote Speaker was Timothy Tobin, “Harnessing the Power of Your Leadership Story”. The Plenary Speaker was Dr. Michelle Rozen, “Winning Leadership Strategies Towards Growth and Success”.

**Spring 2017 General Membership Program.** May 19, 2017, the Spring General Membership meeting was held at Rider University. The meeting was well attended with approximately 100 participants. Topics included: **“The Basics of Commissioning & Retro-Commissioning”** and **“Hydrovac New Path to Safe Digging Practices”**.

Chapter elections took place, electing two First Term Board Members: Lavone Broxton, Director at Large from Montclair State University and Mike Rica, Director at Large from Rider University. Yohanna Alcantara of Rutgers University was elected Treasurer. Richard Stomber of William Paterson University was elected President Elect.

**Supervisor’s Toolkit.** June 19 – 21, 2017, Montclair State University was the host site for this chapter supported educational event with the program designed and developed by APPA. Michelle Frederick of American University was the presenter and trainer who led 35 facilities professionals through this formal supervisory training program.

#### 4. Chapter Events Planned 2017-2018

**Fall Educational Program:** Kean University, scheduled for October 20, 2017.

**Spring Educational Program:** April 18-20, 2018 – Spring Meeting @ Seaview Resort

#### 5. Upcoming ERAPPA Conference

The NJAPPA Board will be attending the 2017 ERAPPA annual conference in Washington, DC.

#### 6. Membership

Our Institutional Membership numbers are stable. We continue to work at recruiting new members including community colleges. Richard Stomber will lead the recruiting efforts.

#### 7. Scholarships

2017: (5) NJAPPA Scholarships will be awarded for the annual ERAPPA conference.

#### 8. Awards and Recognition

At our Spring General Membership Meeting we recognized both Andrew Christ of New Jersey Institute of Technology and Dave DeHart of Rutgers University for their long standing service and dedication to NJAPPA.

## 9. Major Initiatives

**Membership.** The Chapter continues to cultivate its membership by establishing personal contacts. We have welcomed Board Members from Montclair State University and Rider University.

**Educational Needs.** The Chapter continues strive to present meaningful educational topics for our membership and encourages our membership to be a resource for all of NJAPPA.



## NORTHERN NEW ENGLAND CHAPTER NNECERAPPA

*Richard Battistoni*, Chapter President  
Saint Michael's College



### 1. Chapter Leadership

President	<b>Richard Battistoni</b>	Saint Michael's College
Vice President	<b>Paul Campo</b>	University of Vermont
Secretary/Treasurer	<b>Jessica Picard</b>	University of Southern Maine
Maine State Director	<b>Jason Morin</b>	Bates College
New Hampshire State Director	<b>Gary Harper</b>	The Derryfield School
Vermont Director	<b>Tom Baker</b>	Norwich University
Ex-Officio/Past President	<b>John J O'Shaughnessy</b>	St. Paul's School

#### Committee Representatives

Membership Chair	<b>Kathy Kokin</b>	Phillips Exeter Academy
Professional Development Chair	<b>Tim Garland</b>	Keene State College
Business Partner Chair	<b>Rich Wolbach</b>	University of Vermont
Technology Chair	<b>Billy Gagnon</b>	Phillips Exeter Academy
Emeriti Chair	<b>Hank Dozier</b>	Retired
Business Partner Liaison	<b>Kathryn Risotti</b>	Genesan

#### ERAPPA Committee Representatives

Chapter Affairs	<b>Richard Battistoni</b>
Professional Development	<b>Tim Garland</b>
Membership	<b>Kathy Kokin</b>
Technology	<b>Billy Gagnon</b>

### 2. Chapter Governance

Bylaws were last revised April 19, 2017. There were significant changes in the bylaws since last report. Finding an institution that could host a meeting in the fall was a constant difficulty. Beginning in the spring of 2019, NNECERAPPA will host one, 2 day meeting in the fall. UVM is currently scheduled to host this meeting. We also reduced the number of scholarships offered from 16 to 8 to account for only hosting 1 meeting/yr. Scholarships continue to be set at \$2,000. Other changes included formally naming the position of "Business Partner Liaison" to the Board, changing annual membership dues from \$50 to \$100 and changing the fiscal year to January 1 – December 31 (to line up with tax year). Minor typographical and formatting changes were also included.

### 3. Chapter Events in July 2016-August 2017

Board Meetings & Conference Calls

- April 20-21, Bates College, Lewiston, ME, Chapter conference.
- July 23-24, 2017 - Chapter Retreat Meeting @ Radisson Hotel & Expo Center
- Conference Calls: Calls are held monthly

#### 4. Chapter Events Planned 2017-2018

Spring 2018 Meeting: SNHU & The Derryfield School, Hooksett, NH, 3/12/18  
 Spring 2017 Meeting: Bates College, Lewiston, ME – April 20-21, 2017

#### 5. Hosting for Upcoming ERAPPA Conference

The NNECERAPPA Board is planning for the 2018 ERAPPA annual conference. John O’Shaughnessy and Connie Simmons are co-chairs for the conference. The location is Manchester, NH: September 30<sup>th</sup> – October 3<sup>rd</sup> 2018. The theme is “REVITALIZE”.

#### 6. Membership

Our Institutional Membership numbers are holding. We continue to work at recruiting new members including K-12 and community colleges.

#### 7. Scholarships

Approx. \$12,000 in scholarships were given out to APPA, ERAPPA and NECERAPPA events.

#### 8. Award and Recognition

Phil Meldrum, Bates College, was presented with a Certificate of Appreciation for all his service to the Chapter and recognized as one of the Founding Fathers of NNECERAPPA.

Leo Deon, University of Maine, was presented with a Certificate of Appreciation for all his service to the Chapter and received Emeritus Status.

Anita Bailey, Phillips Exeter Academy was presented with a Certificate of Appreciation for all her service to the Chapter.

Connie Simmons, Phillips Exeter Academy was presented with a Certificate of Appreciation for all her service to the Chapter.

The Chapter continues to recognize long-term attendees through its pin recognition program. Recognitions are for 5 year, 10 year, 15 year and 20+ year increments. An “Emeritus” status is also recognized.

#### 9. Major Initiatives

**Membership.** The Chapter continues to develop membership by establishing personal contracts through Business Partners and institutional members.

**Educational Needs.** The Chapter ensures cutting edge sessions, and strive to provide AIA and other professional CEUs for the sessions.

**Technology.** The chapter continues to update and refresh our webpage as needed.

## 10. Major Areas of Concern

Ramifications of changing from hosting 2 Chapter conferences per year to hosting 1 Chapter conference per year. The Chapter will continue to poll institutional members, host committees, business partners and conference attendees to assess any potential negative impacts to the Chapter mission.

There have been significant changes on the Chapter's standing committees and the Chapter will strive to bolster membership on these committees.

## New York Chapter NYAPPA

*Barry McHugh, Chapter President*  
University of Rochester



### 1. Chapter Leadership

President	<b>Barry McHugh</b>	University of Rochester
First Vice-President	<b>Paul Wurster</b>	Monroe Community College
Second Vice-President	<b>John McEnrue</b>	SUNY at New Paltz
Past (Past) President	<b>George Stooks</b>	SUNY at Genesco
Treasurer	<b>Mike LaPoint</b>	Nazareth College
Secretary	<b>Kim Nelson</b>	SUNY at New Paltz

### 2. Board of Directors

KyuJung Whang	Cornell University
Rex Giardine, PE/RA	Syracuse University
Greg Lischke	Ithaca College
Kevin Thompson	Buffalo University
John Moore, PE	Rochester Institute of Technology
Alternative Directors	
Andrew Germain	Cornell University
Tim Cary	Ithaca College
Jim Chodak	University of Rochester

#### ERAPPA Committee Representatives

Chapter Affairs	Barry McHugh
Professional Development	Andrew Germain
Membership	George Stooks
Technology	John Moore

#### APPA Committee Representatives

No Representatives

### 3. Chapter Governance

None at this time.

### 4. Chapter Events:

The University of Rochester will be hosting a Drive-in conference on September 21, 2017, this program is listed on the APPA Education web page. This one day five track program will be focused on Transportation, Electrical, Infrastructure, Ventilation and Security. All tracks will offer AIA credits which greatly enhances the importance of helping our colleague's in engineering fields. We have

just completed another very successful Toolkit class in SUNY New Paltz with 26 graduates. We are in the process of planning another in late fall at another area in the state.

**5. Membership**

None at this time

**6. Scholarships**

None at this time.

**7. Awards and Recognition**

None at this time

**8. Major Initiatives**

NYAPPA has been very busy with its new WEB design and are planning a end of year roll out. With that completion we will continue with a joint WEB design for both NYAPPA and the NYS higher education system SUNYPPAA. We also continue to partner with SUNY on joint programs and conferences to ensure higher turnout and cost down.

**9. Major Areas of Concern**

None at this time

## ONTARIO CHAPTER OAPPA

*Tom Saint-Ivany, Chapter President*  
Brock University



### 1. Chapter Leadership

President	<b>Tom Saint-Ivany</b>	Brock University
	<b>Paul Martin</b>	Western University
Past (Past) President	<b>Rick Zalagenas</b>	University of Waterloo
Vice-President/Secretary	<b>Hugh Briggs</b>	LakeHead University
Treasurer	<b>Claudio Brun del Re</b>	University of Ottawa
Energy Committee Chair	<b>Paul Martin</b>	Western University

### ERAPPA Committee Representatives

ERAPPA Board	<b>Paul Martin</b>	Western University
Technology & Communications	<b>Gordon Robins</b>	University of Toronto
Chapter Affairs	<b>Tom Saint-Ivany</b>	Brock University
	<b>Hugh Briggs</b>	LakeHead University
Professional Development	<b>Kevin Gallinger</b>	Carleton University
Membership	<b>Steve Sicluna</b>	York University

### 2. Chapter Governance

There has been no change in the structure since the last report. The organization did a review to see if changes to recent tax and not for profit law in Ontario would require any changes. None were identified.

### 3. Chapter Events September 2015-August 2016

#### Directors

- September 13, 2016 – at York University
- December 12, 2016 – at York University
- March 30, 2017 – at York University
- June 2, 2017 – at Wilfrid Laurier University

#### Energy Committee

- September 12, 2016 – York University
- December 11, 2016 – University of Toronto
- March 29, 2017 – at Ryerson University

#### Annual Conference

- OAPPA 2017 – May 30, 2017 to June 2, 2017 – at Wilfrid Laurier University

#### 4. Chapter Events Planned 2016-2017

##### Directors

September 20, 2017 – York University

December 13, 2017 – York University

March 29, 2018 – York University

June 1, 2018 – York University

##### Energy Committee

September 19, 2017 – Ryerson University

December 12, 2017 – University of Toronto

March 28, 2018 – Ryerson University

##### Annual Conference

York University May 29, 2018 to June 1, 2018

#### 5. Membership

Membership is stable and the participation rate is very good. Last year OCFMA and OAPPA joined together for the Energy Committees to have one meeting for both groups. This year OCFMA and OAPPA are looking at joining the organizations together for APPA and ERAPPA purposes. A team will be setup to see how PD events can be adjusted to meet both the needs of the colleges and universities.

#### 6. Scholarships

Nothing to report.

#### 7. Awards and Recognition

Nothing to report.

#### 8. Major Initiatives

Ontario Cap & Trade (tax on carbon) has been released. The Universities and Colleges together negotiated funding for the sector to help move us to a GHG free environment.

Education sessions on Cap & Trade have occurred at all meetings involving both colleges and universities.

Lobbying the Ontario government on a number of issues:

- Changes to the Lien and construction act - Prompt payment to contractors and sub-contractors
- Cap & Trade – funding and type of projects funds can be spent
- Energy reporting
- Changes to the Waste and Recycling regulations
- Changes to the Boiler and Pressure Vessel regulations
- Changes to the definition of Class A accounts for electricity use

#### 9. Major Areas of Concern

Nothing to report.

## SOUTHERN NEW ENGLAND CHAPTER SNEAPPA

*Keith C. MacDonald* Chapter President  
Bridgewater State University



### 1. The Leadership

President	<b>Keith C. MacDonald</b>	Bridgewater State University
Vice President	<b>Jerry Sidio</b>	University of Rhode Island
Secretary	<b>Vacant</b>	
Treasurer	<b>Jessica Abbott</b>	University of Hartford
Board Members	<b>Keith Woodward</b>	Quinnipiac University
	<b>Melinda Lamoureux</b>	Bridgewater State University
	<b>Douglas Michael</b>	University of Rhode Island
Webmaster	<b>Peyton Gibson</b>	University Rhode Island
	<b>John Marshall</b>	University Rhode Island

#### ERAPPA Committee Representatives

Chapter Affairs	<b>Keith C. MacDonald</b>	Bridgewater State University
Professional Development	<b>Douglas Michael</b>	University of Rhode Island
Membership	<b>Melinda Lamoureux</b>	Bridgewater State University
Technology	<b>Peyton Gibson</b>	University of Rhode Island

### 2. Chapter Governance

BYLAWS WERE LAST REVISED IN JUNE 2008 AND ARE CURRENTLY UNDER REVIEW

### 3. Chapter Events in 2017

**The Chapter holds 3 meetings per year - Fall, Spring, and Summer.**

Chapter meetings begin 8am to 9am with registration, continental breakfast, and networking. Before the educational portion of the program begins, the Chapter President and other Board Members provide the Chapter Membership with business related updates.

**Two educational sessions** along with additional **networking** are provided before lunch, followed by tours of the hosting campus or venue.

Our meeting usually adjourns by 2:30pm. In an effort to keep the meetings engaging, the Board may also provide an educational track session or contract with a guest speaker.

This year our fall meeting was held at

#### 1. University of Connecticut

- a. The first session was "Technology in Context": Godzilla or Tokyo? It was an engaging presentation of technology and its relationship to industries over time.



- b. Second session was a presentation on “UCONN’s Facilities Organizational Structure”. The evolution of UCONN’S facilities organizational structure, why change was necessary and how it looks today.
- c. Tours of facilities followed lunch

## 2. University of Rhode Island June 2017

- a. The day’s events started with a brief business meeting. Our board did a review for our members on the ERAPPA mid-year mtg. pitching the ERAPPA 2017 conference.
- b. First Session section A. titled “Animal’s on Campus” Panel discussion of policies and practices to manage service animals, comfort animals, etc.  
Section B. “Workplace Fitness and Injury Protection” Discussed stretches and exercises that can be used daily in the shops or offices to help reduce work injuries.
- c. Second session “South County Solar Consortium” section A. panel discussion of adjoin towns to URI on a project that will provide over 45MW of solar back into the grid.  
Section B. “Grounds Management in Capital Construction” Discussed the construction management by URI Grounds Dept. during and after building construction.
- d. This was followed by lunch and campus tours

## 3. Dunkin Donuts Center, Hartford, Ct. November 2017

- a. First session “The Dynamics and Competing Priorities of Meeting Capital Project Budgets”
- b. Second session being finalized

## 4. Chapter Events for 2017

- January 2017 board mtg. Providence, R.I. review of the ERAPPA 2015 event
- June 2017 board meeting URI. planning mtg. upcoming events
- Conference calls website updates, scholarship review, candidate nominations

## 5. Membership

Attendance for all meetings has been strong with approximately 90-105 attendees. We continue to reach out to our constituency in an effort to provide educational programs that are relevant to our everyday professional responsibilities. The board is considering a change toward formalizing our membership to include actual membership applications, membership limited and other requirements.

## 6. Scholarships and Awards

The Chapter continues to award scholarships based on requests and needs to chapter members. The board considers additional scholarships toward the ERAPPA annual meeting on a need basis. Chapter fully supports APPA/ERAPPA credentialing efforts and is in discussions to host localized training to assist our members

Special awards, including the President’s Award are still in development.

## **7. Finances And Dues**

The SNEAPPA continues to see solid registration numbers for the spring, summer and fall meetings. This has allowed the Board to pursue a scholarship program as discussed above.

With rising costs our board lowered our registration fees to \$60.00 to cover our costs. This has paid dividends with record attendance at our Spring and Summer mtgs. Our registrants have been appreciative in these tight budget times.

We work hard to get the registration and agenda out a month before each event and allow attendees the option of paying by check in advance or at the door.

We do not charge an annual fee for membership which keeps participation relatively inexpensive and easy.

## **8. Business Partner Relationships**

Business Partners are welcome at all Chapter Meetings but do not provide any type of sponsorship. While we realize the importance of our Business Partners, we ask them to keep a low key or informal approach toward any type of member solicitation. In this respect, we hope to insure that our educational facilities attendees feel relaxed at the meetings.

There has been a concerted effort to get business partners more active in the duties of the chapter. This is being accomplished by pairing a business partner with an officer or other institutional member to help complete duties. For example, a business partner works with our webmaster to ensure that chapter website is up to date and accurate.

## **9. Major Areas of Concern**

Nothing to report.