



ANNUAL REPORT

To Membership

2019- 2021



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ERAPPA BOARD

President	Jessica Abbott	Wolcott Public Schools
President - Elect	Sheri Vucci	Smithsonian Institution
Vice President, Professional Development	Mary Grube	St. Mary's College of Maryland
Vice President, Membership and Community Engagement	Patty Smith	Cabrini University
Vice President, Annual Meetings	George Stooks	St. John Fisher College
Vice President, Technology and Communications	Jason Sawyer	Smithsonian Institution
Vice President, Chapter Affairs	Andy Wilson	Slippery Rock University
Secretary	Jon Terry	Quinnipiac University
Treasurer	Phillip Melnick	Penn State University
Past President	Arthur Walsh	Dalhousie University
APPA Liaison to ERAPPA	Lander Medlin	
Business Partner Representative	Amy Baker	

ERAPPA Reps to APPA Committees

Awards and Recognition Committee	Scott Albert	KAPPA
Business Partner Advisory Committee	Amy Baker	NJAPPA
Information and Communication Committee	John Moore	NYAPPA
Member Engagement Committee	Marina Clayton-Therault	AAPPA
Professional Development Committee	Robert Aldrich	SNEAPPA

President's Message

Jessica Abbott, ERAPPA President

Wolcott Public Schools



Dear ERAPPA friends and colleagues,

It has been a great honor to serve as your ERAPPA President these past two years! My APPA journey started in 2010, when I attended the APPA Institute in Scottsdale, Arizona and I can think of no better way to celebrate my first ten years than to have served as the president of this region I am so proud of. I know many will agree with me when I say that 2020 was nothing like I expected. Everything started to change quickly back in March 2020, as we were gearing up for the Mid-year Meeting and travel restrictions began to be implemented. The decision was made to cancel the face-to-face Mid-year Meeting, but we were still cautiously optimistic that we could look forward to a successful Annual Meeting in the fall. As we moved closer to the typical timing of the opening of registration the Board worked closely with the 2020 Host Committee Chairs and Conference Planner, concerned about the potential success of the annual conference and the safety of our members. As a result, we made the incredibly difficult decision to cancel our 2020 Annual Meeting and reschedule AAPPAs' hosting to 2023; providing them an opportunity to host a successful conference without having to wait 9 years - the usual cycle of Chapters hosting Annual Meetings.

With the cancellation of ERAPPA 2020, the ERAPPA Board discussed if we should proceed with a virtual election or keep the existing ERAPPA Board in place for another year. While everyone on the ERAPPA Board was willing to serve for an additional year, we felt it was imperative that we did not make decisions of that importance in a vacuum. Past President Arthur Walsh reached out to the Chapter Presidents and asked them to discuss with their local boards if they believed we should move forward with an election or defer a year. Many Chapters reported they had delayed their election processes as well and they were unanimously in support of keeping the existing ERAPPA Board in place for an additional year. I was very humbled by the positive feedback we received from the Chapters and the trust laid in us. Please know the ERAPPA Board will continue this model of servant leadership as many more discussions and decisions lay ahead as we continue to navigate through the COVID-19 pandemic. 2021 did reveal some hope on the horizon as vaccines became available and states announced updated reopening plans, but there was still much uncertainty about when things would be "normal" again. The ERAPPA Board worked with the ERAPPA 2021 Host Committee Chairs and Conference Planner as well as Chapter Presidents to discuss the potential success of a fall annual conference. With no guarantees if institutions would be allowing travel, if professional development budgets would be available, or if it would be safe to gather in person in large numbers – we decided to cancel our 2021 Annual Meeting and rescheduled DVAPPA's hosting to 2024.

After canceling ERAPPA 2021, the ERAPPA Board found ourselves again discussing what to do about elections. Past President Arthur Walsh worked with Vice President of Chapter Affairs Andy Wilson to formally poll the Chapters for their feedback. The polling was conducted by the Chapter Presidents to at least the Chapter Boards and if possible, to larger membership. The questions asked were:

1. Should ERAPPA conduct a virtual vote for a new Board of Directors for the 2021 – 2022 Fiscal Year?
2. If ERAPPA does not conduct a virtual vote to elect a new Board of Directors, clarity is required in respect to current Board Member's terms. For all VP positions the length of each term is 2 years, and a maximum of two terms may be served. For a VP elected to their first term in October 2019, a lack of an election in 2020 and 2021 will mean they will have served 4 years by the next in-person Annual Meeting in 2022. Should this 4-year period be considered the maximum length of service on the Board? OR – Should this 4-year period be considered one extended term, thereby allowing the individual to run for a second term?

The majority votes from Chapters answered that ERAPPA should not conduct a virtual vote for a new Board of Directors and that the four-year period of 2018 through 2022 should not be considered the maximum length of service for any applicable Board positions and that it should be considered one extend term, allowing any eligible Board positions to run for a second term. The ERAPPA Board reviewed this information during our June 2021 Board Meeting, during which we were able to have half of the Board meeting together in-person while the rest attended virtually. Knowing we had another year of service to ERAPPA ahead, we enthusiastically dived into our other agenda items – most importantly how to revitalize and reengage our Committees and members during this predominantly virtual time. This kicked off our plans for a Virtual Business Meeting and Professional Development Session, free to all ERAPPA members, to be held on September 21st, 2021, at 1 pm EST.

Professional Development – ERAPPA strives to be a key resource for the professional development of our members. With no Annual Meeting offered in 2020 and 2021, the Board sought alternative ways to provide education and value. One way that we did this was to sponsor the opportunity for 20 institutional members to attend APPA's Virtual Facilities Summit which took place August 3rd – 5th 2020. We were happy to be able to duplicate this initiative in 2021, offering 35 scholarships to attend the 2021 APPA Virtual Facilities Summit which took place July 20th – 22nd 2021. Under the esteemed leadership of Amy Baker and Mary Grube, and with the support of APPA, we were also able to offer additional ERAPPA lunch & learn webinars, which are free to ERAPPA members. APPA now has virtual offerings of Supervisor's Toolkit and Leadership Academy, and we are pleased to be able to offer educational scholarships to more institutional members than usual due to the lower cost of these virtual programs.

Finances – ERAPPA remains fiscally strong at this time, and we are hyperaware of the need to think differently to ensure that continued success for ERAPPA and its Chapters. The Board, under the leadership of its Treasurer, continues to act responsibly as the stewards of ERAPPA's assets and is very thoughtful and thorough when it drafts, reviews, discusses, and adopts the annual ERAPPA budget. This became more important than ever these past two years when we had to cancel both the 2020 and 2021 Annual Meetings, which meant ERAPPA would earn no income outside of membership dues. The Board is keeping a close eye on long term financial impacts from the COVID-19 pandemic and we take our fiduciary responsibilities very seriously. Knowing that many institutions have implemented freezes on professional development and travel budgets, we continuously look for virtual opportunities to positively impact as many members as possible with the decisions we make, looking to put your membership dollars to the best possible use. Our Treasurer has also been very thorough in ensuring all

insurances, federal tax-exempt filings, and financial audits are fully executed in protection of the organization.

On behalf of the Board, I extend a heartfelt thank you to all the volunteers who have worked so hard to make all the aforementioned accomplishments happen while facing unprecedented challenges at your institutions and organizations. This is an extraordinary organization made up of extraordinary people. I am fortunate to have worked with them over the past two years and I look forward to serving as your President for another year. Finally, a sincere thank you goes out to Greg Clayton, Kevin Simpson, Alexia McGill, Jon Brighton, Leslie Whitby, Yvonne Shaw, and the entire 2020 & 2021 Host Committees for their efforts in planning what was sure to be outstanding Annual Meetings.

Jessica Abbott
Wolcott Public Schools
ERAPPA President

Chapter Affairs Committee

Andy Wilson, Vice President

Slippery Rock University



The ERAPPA Chapter Affairs Committee Representatives are:

Craig Hickey	President Atlantic Provinces	AAPPA
Andy Feick	President Delaware Valley Chapter	DVAPPA
George Papuga	President Keystone Chapter	KAPPA
Sheri Vucci	President Maryland-DC Chapter	MD/DC APPA
Joana DosSantos	President New Jersey Chapter	NJAPPA
Paul Campo	President Northern New England Chapter	NNECERAPPA
Kimberly Nelson	President New York Chapter	NYAPPA
Hugh Briggs	President of Ontario Universities	OAPPA
Tim Schill	President of Ontario Colleges	OCFMA
Chris Dupuis	President of Southern New England Chapter	SNEAPPA

Outgoing Members during 2019:

John Brighton	Delaware Valley Chapter	DVAPPA
Phillip Melnick	Keystone Chapter	KAPPA
Kelly Geishauser	Maryland/DC Chapter	MD/DC APPA
Paul Wurster	New York Chapter	NYAPPA
Todd Miller	New Jersey Chapter	NJAPPA

CHAPTER LEADERSHIP

There has been a number of changes at the president's level in our chapters. There are five new members. I am sure the new group will bring the same level of enthusiasm and provide impressive leadership to their chapter constituents. The presidents are representative of the usual strong leaders we have come to expect.

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

GOVERNANCE

The chapter presidents will have an opportunity to be the catalyst to promote the strategic plan at the chapter level along with other initiatives from the national to the local chapter level.

There will also be a concerted effort by the chapter presidents to draw a larger pool of prospective candidates for the ERAPPA Board. This will be a primary objective for the coming year. The Presidents were encouraged to nominate a chapter champion candidate from each chapter.

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 has been an exceptional year for finding new educational venues with the introduction of restrictions brought on by the Covid 19 epidemic. This year ERAPPA continues to offer the opportunity for all ERAPPA members to take the EFP-CEFP credential exam at a reduced 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. Additional webinars and other educational opportunities were offered because of the epidemic.

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. The epidemic brought in person meetings impossible to have. Hopefully when travel and group meeting restrictions are lifted many chapters will witness an increase in attendance.

SCHOLARSHIPS

With the multitude of chapter, regional, and national **scholarships available**, we are proud that many 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. ERAPPA has been able to provide additional scholarships with the reduction in cost to attend programs remotely.

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. Many chapters have been trying to keep their membership engaged thru virtual social gatherings.

MID-YEAR & ANNUAL MEETING

This year's **Mid-Year Meeting** in Saint John, New Brunswick was cancelled due to the pandemic. All travel was halted between the United States and Canada. We were all looking forward to getting together and enjoying the hospitality of the AAPPA chapter. The annual meeting in Erie, Pa. proved to be very successful. 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. Attendance at ERAPPA 2019 provided not only a great educational product, but also time to enjoy the hospitality and history of the Erie. We are all looking To are next meetings hosted by NYAPPA.

Technology and Communications Committee

Jason Sawyer, Vice President

Smithsonian Institution



The ERAPPA Technology & Communication Committee Representatives are:

Bruce McNeil	Atlantic Provinces	AAPPA
Brett Fulton	Delaware Valley Chapter	DVAPPA
Erik Cagle	Keystone Chapter	KAPPA
Brad Newkirk	Maryland-DC Chapter	MD/DC APPA
Lavone Broxton	New Jersey Chapter	NJAPPA
Billy Gagnon	Northern New England Chapter	NNECERAPPA
John Moore	New York Chapter	NYAPPA
Rich McEvoy	Ontario Colleges	OCFMA
Gordon Robbins	Ontario Universities	OAPPA
Peyton Gibson	Southern New England Chapter	SNEAPPA
Vivica Williams	Business Partner Liaison	

Outgoing Members during 2019/2020:

None

Host Committee Liaison

Web Sites for Hosts –

- Provide Guidance and support to NYAPPA as they prepared for ERAPPA 2020.
- The 2019 Annual Conference site will be migrated to the 2023 site when ready.

Web Site

Major changes occurred to the ERAPPA website this year with the migration to a new platform. The committee worked with OgoSense to develop the new ERAPPA site which is up and running.

Chapter Web Sites

- Chapters that took advantage of the ERAPPA sponsored migration have been completed. The Chapters have refreshed the content, look, and feel of their sites.
- Added a security feature to the contact form for the chapters to decrease spam from e-mails.

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.

Video Chat Service

- ERAPPA studied and decided to purchase an enhanced Microsoft Office subscription which includes Teams for video conferencing capabilities. This also allowed us to remove our Dropbox subscription for file storage to offset the cost of the new Microsoft subscription.

Scholarships

- Assisted with updating the scholarship forms and website language for ERAPPA members to apply. This included a work flow for the supervisors to approve the applicants submission.

Membership Committee

Patty Smith, Vice President

Cabrini University



The ERAPPA Membership Representatives are:

Marina Theriault	Atlantic Provinces	AAPPA
Tyrone Dunston	Delaware Valley	DVAPPA
Brett Fulton	Keystone	KAPPA
Qualjalyn Amos	Maryland/DC	MDDCAPPA
Earl Farrell	New Jersey	NJAPPA
Tandra Boilard	Northern New England	NNECERAPPA
Greg Lischke	New York	NYAPPA
Alan Dunn	Ontario Colleges	OCFMA
Ron Ogata	Ontario Universities	OAPPA
Melinda Lamoureux	Southern New England	SNEAPPA
Nick Cerro	Business Partner Representative	NNECERAPPA
Lander Medlin	Associate VP	APPA

Outgoing members and vacancies during 2019/2020:

George Papuga	Keystone Chapter	KAPPA
Kathy Kokin	Northern New England Chapter	NNECERAPPA
Tracey Hartford	Business Partner Representative	NNECERAPPA

During the 2019-2020 term, The Member and Community Engagement Committee met one time. The sole meeting occurred during the 2019 annual conference in Erie, PA. While putting the finishing touches on the MYM, the 2019 COVID 19 Pandemic restricted travel and caused the cancellation of the 2020 MYM. Committee Business was conducted via telephone conference for remaining months. During the 2019 in-person meeting, the committee held a joint meeting with the Professional Development Committee.

The year's focus was on surviving the Pandemic.

With a cancelled MYM in St. John, NB, none of us expected the cancellation of the 2020 Annual Meeting. However, between March 2020 and June, 2020, the number of positive cases along with a unprecedented number deaths, those of us in higher education including the majority of the committee members, went into survivor mode. Our campuses were suddenly empty, many employees were furloughed, and the new norm included wearing masks and practicing social distancing while keeping the campus buildings and exteriors going strong. The grim reality included cancelling/postponing the 2020 Annual Meeting. ERAPPA Member and Community Engagement activities diminished during this bleak period. We did manage to accomplish the following:

- Contributing essays to the FM publication for Membership Matters section

- Enhancing the First Time Attendee reception in Erie, PA to ensure it is a valuable experience for all involved.
- Presented each conference attendee who attended the FTA with a Bean Blanket. The significance of this item was that for every blanket purchased, the company donated a blanket to a worth charity
- Evaluating the merits of 2019's initiative of continuing engagement of FTAs by hosting breakfast tables for the FTA's at the Annual Meeting
- Creating and delivering an educational session for the 2019 Annual Conference
- Preliminary work on SWAG for the 2020 Annual Conference

A. ERAPPA Liaison to APPA

Marina Theriault continued to represent the Member and Community Engagement as a valued member of the APPA Member and Community Engagement Committee. With a fractured work schedule and a membership renewal process totally interrupted by the Pandemic, Marina and her APPA committee members worked closely to invigorate the renewal process.

B. Facility Manager Magazine

Continuing ERAPPA's contribution to the Facilities Manager Magazine, Patty Smith shared an article for the May-June 2020 edition. There was only one submission needed from ERAPPA.

C. First Time Attendee Reception

With a great deal of planning and coordination, the FTA was a very successful event. The ERAPPA Board's commitment to welcoming new attendees at the Annual Meeting with a meaning and fun program continues to resonate with the attendees long after the conference is over.

The committee members contributions to the process is invaluable. Contributions from the Committee include previewing the space offered at the MYM, helping to create a layout of the podium, food, check in location and creating Chapter Tables. The committee reviews ideas for SWAG, secures samples, pricing, arranges for shipping, coordinates receipt of the items, tags the items, etc. On Sunday, the Committee swings into action 2 hours prior to the event with the goal of making this event perfect. The Committee's success record matches the Conference's success!!

D. Pandemic Activities

Monthly phone calls were minimized during the Pandemic peak months. With little free time, committee members were encouraged to attend the Friday APPA Town Hall meetings to learn how to address the many needs on their respective campuses. During our limited calls, we entertained discussions on how to keep the members engaged with limited chapter meetings. We learned that

E. The APPA APP

The Committee was thrilled to see the addition of an APP for APPA come to fruition. As we partnered with the PD Committee to create a method for connecting, we strongly suggested that APPA take this step. With the new app in place, the Member and Community Engagement and the PD Committee should re-engage and take strong steps to get the PEP moving forward!

F. EDUCATIONAL SESSION

A major initiative for the committee was the development of an educational session. The group acknowledges how overwhelming it is for a new member to understand the organizational structure of APPA, its regions, the chapters and how s/he fits in. An educational session, created by Andy Feick, Marina Theriault and Julius, was created, presented to the committee, and was offered on Monday morning. The session was a success!!

G. Scholarships and Recognition

The 2020 ERAPPA Ambassador Scholarship was not awarded due to the cancellation of the Annual Conference.

ERAPPA awards Educational Scholarships to individuals who submit applications. The process is competitive, and all submissions are reviewed by a sub-committee of the ERAPPA Board of Directors. Winners attend a program in the year following the award. Attendees are requested to share a brief written report sharing how the educational program benefited them personally and professionally.

The ERAPPA Board continued with providing educational scholarships in 2020 to be used in 2021. There were two 2019 scholarship recipients who had intended to attend the September 2020 offering of the APPA Leadership Academy. Due to the COVID 19 Pandemic, the session was cancelled. These two recipients, Mariana Theriault and Jayson Davis will be registering in 2021.

It should be noted that not all the APPA educational programs are able to be offered virtually.

Following is the breakdown of the 2020 ERAPPA Scholarship Program:

Number of applicants	24
Number of chapters represented	9
Programs applied to	3

Scholarships were awarded to:

Nichola Embelton-Lake	Dalhousie University	AAPPA	ALA
Jerry Santos	Bridgewater State University	SNEAPPA	ALA
David Batchly	University of Vermont	NNECERAPPA	ALA
Shawn Limrick	Penn State Behrend	KAPPA	SALA
Melissa Bergeron	UMASS Amherst	SNEAPPA	ALA
James Erodogdu	Rutgers	NJAPPA	ALA
Devin Peterson	Mt. St. Vincent University	AAPPA	ALA
Emmett Urban	Western Suffolk	NYAPPA	ALS

H. ERAPPA Member and Community Engagement Committee Goal Achievement

- ✓ 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.

- ✓ Created stronger alliances with the PD Committee to advance lifelong learning objectives and to initiate discussion on the mentoring program called Professional Engagement Professionals (PEP)
- ✓ Contributed strong essays to the Membership Matters Section of the Facility Manager Publication.
- ✓ Supported the APPA Credentialing program through marketing at chapter level
- ✓ Continued to improve the First Time Attendees experiences by hosting the reception and breakfast programs to enrich the Annual Meeting experience.
- ✓ Presented an educational session at the 2019 conference.

Professional Development Committee

Mary Grube, Vice President

St. Mary's College of Maryland



The ERAPPA Professional Development Representatives are:

VACANT	Vacant	AAPPA
John Camusi	Villanova University	DVAPPA
Gregory Black	Millersville University	KAPPA
Charles Lavallee	The Catholic University of America	MD/DC APPA
Tim Pratt	Bates College	NNECERAPPA
Andrew Germain	Cornell University	NYAPPA
VACANT		OAPPA
VACANT		OCFMA
Doug Michael	University of Rhode Island	SNEAPPA
Amy Baker	DI Group Architecture	NJAPPA/Business Partner

Outgoing members during 2019/2020:

Neil MacEachern	Mount Allison University	AAPPA
Kevin Simpson	University of New Brunswick	Rep to AAPPA PD Committee

The Professional Development Committee met once this year:

At the ERAPPA Annual Meeting in Erie, PA.:

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 (PDC) 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.

The Professional Development Committee members worked closely with the 2020 Annual meeting host Professional Development Committee to carefully review and narrow down the presentations that were to be offered at the 2020 Annual Conference. Unfortunately, due to COVID-19 pandemic the ERAPPA 2020 Annual Conference was cancelled. In addition, the 2021 Annual Conference was cancelled due to the COVID-19 pandemic.

The Professional Development Committee worked closely with the Member and Community Engagement Committee to discuss steps in developing a mentor/mentee program at the regional level. We engaged membership and began having members sign up myAPPA Community on the APPA website. This initiative has currently been tabled due to the COVID-19 pandemic.

Conference calls have been held monthly and emails were exchanged with the committee throughout the year. The Professional Development Committee worked on engaging members in the myAPPA Community with the assistance of the Membership & Community Engagement Committee, and continued promoting APPA credentialing.

ERAPPA Initiatives:

Lunch & Learn Webinars – ERAPPA’s Lunch & Learn Webinars continue to be well received and well attended. Webinars were held in November 2019 (*Transforming the Academic Zone: A Case Study in Institutional Renewal*), February 2020 (*Penn State Lighting and Crosswalk Inventory*), **May 2020 (*Better Document Management Practices: Improving Access to Drawings and Emergency Operations Documents*)**, August 2020 (*Accelerating Recovery with Bipolar Ionization*), November 2020 (*Measure. Strategize. Act. Customizing your renewable Energy Strategy to meet Institutional Goals*), March 2021 (*Roofs as a Resource: Components & The Design of Green Roofs*), and May 2021 (*Unlocking Hidden Value Propositions in Built Environments to Maximize User Experiences*).

The Professional Development Committee and Business Partner Committee decided in May 2020 to increase the number of Lunch & Learn Webinars to help keep membership engaged during the COVID-19 pandemic.

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.

Continuing Education Credits:

Program Certifications – The PDC continues to certify qualifying programs for AIA Continuing Education credits for AIA Members and Architects at the Annual Meeting. The PDC 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 certificates were provided for attendance at webinars that have been approved for AIA CEU credits.

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:

CEFP Credentialing – ERAPPA, working with APPA, has underwritten the cost associated with these desirable certifications. From July 2019 to June 2021, 189 people from ERAPPA used a FREE coupon to register for the CEFP credentialing.

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. ERAPPA did not host any Drive-In Workshops in the previous two prior years.

Supervisor's Toolkit - Specifically tailored to meet the needs of developing supervisors in the facilities management profession. Supervisor's Toolkit has been offered in several ERAPPA chapters face-to-face prior to the COVID-19 pandemic. Supervisor's Toolkit since COVID-19 has been offered once virtually and was a huge success. It consistently attracts staff from multiple institutions and sometimes-neighboring chapters.

APPA U – The Institute for Facilities Management and The Leadership Academy was held February 2-6, 2020 in San Diego, CA. A second one was scheduled for September 13-17, 2020 in Pittsburgh, PA; however, this was cancelled due to the COVID-19 pandemic. In addition, the January 2021 offering was also cancelled due to the pandemic.

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.

Annual Meetings Committee

George Stooks, Vice President

St. John Fisher College



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

John Moore	Rochester Institute of Technology	NYAPPA (2022)
Rex Giardine	SUNY College of Environmental Science and Forestry	NYAPPA (2022)
Greg Clayton	University of Prince Edward Island	AAPPA (2023)
Kevin Simpson	University of New Brunswick – St. John	AAPPA (2023)
Leslie Whitby	Stantec	DVAPPA (2024)
Jon Brighton	Temple University	DVAPPA (2024)

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 the 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 and maintain continuity from one year to the next. The Vice President for Annual Meetings serves as the liaison between the ERAPPA Board and all active host committees, advocating on the host committees’ behalf on initiatives that require action by the ERAPPA Board to facilitate change and act in the best interest of the broader ERAPPA membership.

After a very successful annual meeting in Erie, Pennsylvania at ERAPPA 2019 we have seen circumstances beyond our control lead to delaying two annual meetings in a row. The nature of what we do as Facilities Professional dictates a need for flexibility on a daily basis and this helped reorganize our annual meeting schedule in the face of the pandemic. ERAPPA 2020 in St. John New Brunswick was moved to 2023 and ERAPPA 2021 is now scheduled to be in 2024 in Valley Forge, Pennsylvania. The strength and resiliency of those two host committees, our event planners, and the ERAPPA Board in adjusting to the circumstances was critical in deciding to postpone and minimize the financial impact of those decisions. As we look forward to ERAPPA 2022, scheduled for Verona New York, the host committee is putting together suggestions on reformatting both the mid-year and annual meeting schedules. Although there is over a year to go before ERAPPA 2022, much work remains to be done to pull together a successful conference. We look forward to a preview from the 2022 host committee co-chairs at the ERAPPA business meeting in September.

With site selection done for the next 3 years annual meetings, somewhat by default due to the delayed meetings I look forward to reengaging with the HC from AAPPA and DVAPPA when the time comes. The experience of serving as a chair/co-chair or member of a host committee is very rewarding; it requires a lot of hard work but pays dividends in the end. I encourage everyone to give it a try.

Treasurer's Report

Phillip Melnick, Treasurer

Penn State University



ERAPPA Year-End Treasurer's Report July 1, 2019 – June 30, 2020

The 2019-2020 fiscal year resulted in a net financial profit in the amount of \$58,043.51. This is 154% positive difference from the \$107,645.10 loss that was budgeted.

Revenue from membership dues was 43% more than budgeted, while the 2019 Annual Meeting held in Erie, PA., generated revenue of \$177,925.24 or 68% more than what was budgeted. Combined, revenue was 54.2% over the budget amount.

ERAPPA continues to make a significant investment in our members, expending \$97,722 in scholarships and credentialing coupons. Additionally, the remaining chapters converted their web sites to the WordPress platform, to which ERAPPA pledged \$4,500 per chapter.

Three chapters took advantage of the Partner's in Education (PIE) funding available, with grants of \$2,000 each awarded.

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, 2020 and the preparation and filing of the federally required annual 990 return.

The Mid-Year meeting, where much of the planning and work for the year is executed by the committees, was canceled due to the pandemic, but not before travel arrangements were booked for most board and committee members, resulting in non-refundable expenses of \$25,899, which while significant, is about \$51,000 less than budgeted.

ERAPPA remains financially stable despite a difficult year. The \$20,000 accounts payable for the period ending June 30, 2020 is for grant money budgeted but not yet awarded to the 2021 and 2022 annual meeting host committees. Scholarships payable of \$17,260 consist of scholarships awarded but not yet used. There is deferred revenue \$22,229 for ERAPPA dues collected in 2019-20 by APPA for the 2020-21 fiscal year. There is no accounts receivable balance. There was an unplanned failed meeting expense of \$61,755 to cover expenses incurred by AAPPA for the 2020 Annual Meeting that was postponed due to the pandemic. On June 30, 2020, our cash balance was \$447,877 with prepaid expenses of \$6,570, prepaid scholarships of \$19,800 for an asset balance of \$474,257. This is a decrease in our current asset position of \$119,942 from June 30, 2019. Our net asset position is \$600,022, which is an increase in our net asset position of \$5,823. The change in current assets vs. net assets is due to ERAPPA investing \$125,000 in term-bound certificates of deposit, which are not considered current assets.

ERAPPA's current assets are decreased from those of last year. ERAPPA's strong cash position protected the organization because of the postponed annual meeting. And, while our cash position is less than 2019, ERAPPA remains financially strong and in a position to withstand any future financial difficulties posed by the unfavorable economic climate caused by the pandemic.

Respectfully Submitted;
Phillip Melnick CEF, CRL
Treasurer

ERAPPA YEAR-END STATEMENT
July 1, 2019 - June 30, 2020

2021

ITEM	BUDGET	Yr End TOTAL	Variance
REVENUE:			
Interest	420.00	1,001.81	581.81
Dues	133,248.90	190,346.87	57,097.97
Annual Meeting Proceeds	105,746.00	177,925.24	72,179.24
Sales (Misc Revenue)	-	-	-
TOTAL REVENUE	<u>239,414.90</u>	<u>369,273.92</u>	<u>129,859.02</u>
OPERATING EXPENSES:			
VP Annual Meetings			
Host Com Visits	1,000.00	1,975.43	(975.43)
Winter (Mid-Year) Meet - Co-hosts	6,600.00	3,091.65	3,508.35
Failed Meeting Expense	-	61,755.14	(61,755.14)
sub-total	<u>7,600.00</u>	<u>66,822.22</u>	<u>(59,222.22)</u>
VP Chapter Affairs			
Winter (Mid-Year) Meet - CA Comm.	8,500.00	5,351.27	3,148.73
sub-total	<u>8,500.00</u>	<u>5,351.27</u>	<u>3,148.73</u>
VP Membership			
Winter (Mid-Year) Meet - Mem Comm.	8,500.00	4,470.02	4,029.98
Membership Initiative	4,600.00	4,806.53	(206.53)
sub-total	<u>13,100.00</u>	<u>9,276.55</u>	<u>3,823.45</u>
Board - Administration			
Miscellaneous	500.00	193.25	306.75
Travel- ERAPPA Annual Meeting	1,000.00	2,656.42	(1,656.42)
Travel - APPA Annual Meeting	6,000.00	5,047.17	952.83
Printing & Postage	1,500.00	1,281.02	218.98
Marketing	500.00	-	500.00
Insurance	3,600.00	2,017.49	1,582.51
Incorporation	30.00	25.00	5.00
Board Meet - Winter (Mid-Year) Meet	35,000.00	6,202.71	28,797.29
Board Meet - Summer	14,000.00	443.07	13,556.93
Board Meet - Annual	20,000.00	16,927.13	3,072.87
Bank Fees	600.00	86.00	514.00
Accounting Fees	13,000.00	14,862.25	(1,862.25)
Software Fees	480.00	480.00	-
Dues Collection Fees	15,250.00	19,034.76	(3,784.76)
Annual Meeting Expense	-	2,128.22	(2,128.22)
Commissions & Service Fees	3,000.00	-	3,000.00
Ad-Hoc Meetings - Conference Calls	4,000.00	4,168.65	(168.65)
sub-total	<u>118,460.00</u>	<u>75,553.14</u>	<u>42,906.86</u>
VP Technology-Communications			
Web Review & Development	28,000.00	26,934.86	1,065.14
Dropbox -Professional	1,200.00	1,914.56	(714.56)
Winter (Mid-Year) Meet - T&C Comm.	9,900.00	4,710.84	5,189.16
ERAPPA Communication	1,100.00	925.27	174.73
sub-total	<u>40,200.00</u>	<u>34,485.53</u>	<u>5,714.47</u>
Awards / Scholarships			
Scholarships & Expenses	24,000.00	25,329.30	(1,329.30)
Credentialing Scholarship	90,750.00	72,393.00	18,357.00
Ambassador Scholarship Top-Up	-	-	-
Student Ambassador Scholarship	-	-	-
Awards	2,200.00	2,896.66	(696.66)
sub-total	<u>116,950.00</u>	<u>100,618.96</u>	<u>16,331.04</u>
Professional Development			
Misc. Prof Develop. Expenses	1,000.00	1,050.00	(50.00)
Partners-in-Education Support (PIE)	8,000.00	6,000.00	2,000.00
Winter (Mid-Year) Meet - PD Comm.	8,250.00	2,072.74	6,177.26
PD Webinar Expense	5,000.00	-	5,000.00
Annual Meeting Grant	-	10,000.00	(10,000.00)
Toolkit Sponsorship at Annual Meeting	20,000.00	-	20,000.00
sub-total	<u>42,250.00</u>	<u>19,122.74</u>	<u>23,127.26</u>
Expenses Total	<u>347,060.00</u>	<u>311,230.41</u>	<u>35,829.59</u>
NET	<u>(107,645.10)</u>	<u>58,043.51</u>	<u>165,688.61</u>

ERAPPA Proposed Budget Treasurer's Report
July 1, 2020 – June 30, 2021

For the fiscal year 2020-21 the ERAPPA Board is proposing an operating budget that will result in a year-end operating loss of \$82,586.

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 eighth 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. This year, due to the pandemic, we postponed the annual meeting and are projecting no annual meeting revenue in the budget. While this is a significant reduction in revenue, it is something that ERAPPA is well-positioned for due excellent stewardship of ERAPPA's financial resources by the board through the years.

In this budget, the Board continues to support continuing education for our members. In 2020-21 ERAPPA will be awarding:

- educational scholarships with a total value of \$24,000, for virtual learning opportunities.
- \$45,000, a reduction of \$47,500, in CEFP credentialing coupons, due to a carry-over of more than 40 scholarships and the reduced revenue expected from not having an annual meeting.

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 board, recognizing the financial commitment for regional reps to attend the APPA annual meeting, continues to include funds in this year's budget for that purpose. These line items will not be utilized this year due to travel restrictions and no in-person meetings.

The past two fiscal years, ERAPPA has subsidized the conversion of chapter and annual meeting websites to a new web platform. Those conversions are complete resulting in a reduction to Technology and Communication expenses of over \$18,000. Additionally, ERAPPA purchased Office365 licenses for the organization which will be used for email, file storage, and virtual meetings. This will eliminate expenses for teleconferencing and Dropbox, saving the organization close to \$5,000 per year.

Continuing in 2020, a grant of \$10,000 will be available to host committees, replacing previously provided seed money, which will not need to be repaid.

This budget once again is forecasting a planned deficit, and while we anticipate a significant financial loss this year, and possibly next, the organization's financial health remains strong, allowing the board to not increase the membership dues rate. It is important to note, at the June 2020 Board meeting, the Board exhaustively reviewed budget, ensuring each expense item is required, managed and

reasonable. 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.

Respectfully Submitted;
Phillip Melnick CEF, CRL
Treasurer

ERAPPA BUDGET
July 2020 - June 2021

REVENUE

Interest - Savings Account	2,500	Reflects projected 18-19 interest income
Membership Dues	165,584	Gross Dues; 95% of 3 year avg
Annual Meeting Proceeds	-	2020 Annual Meeting was postponed to 2023 due to pandemic
Refund - ERAPPA Prog Support	-	Repayments are recorded against receivables and not actual revenue

Total Revenue **168,084**

Operating Expense**Annual Meetings**

Expenses and Travel	6,600	6 committee members at \$1,100; 3 yr avg \$1,021 each
Host Committee Visits	1,000	previous 3 year average \$1546. Includes 2 years of Canadian travel.
sub-total	<u>7,600</u>	

Chapter Affairs

Travel - Chapter Meetings	-	eliminated in 15-16, contact is made at MYM
Chapter Affairs Comm Mtg	9,000	10 @ \$900; 3 yr avg \$897 each
sub-total	<u>9,000</u>	

Membership

Membership Comm Mtg	7,750	10 @ \$775; 3 yr Avg is \$758 each
ERAPPA Membership Initiative	4,600	Last 3 yr avg is \$3,618, Board approved \$4,600 in July 2019 conference call
sub-total	<u>12,350</u>	

Administrative/Governance

Miscellaneous expense	500	3 yr avg \$185
Travel - ERAPPA Annual Mtg	-	3 year avg is \$1602. No meeting to attend in 20-21
Travel - APPA Annual Meeting	-	3 yr avg \$4,224 (3 attendees @ \$2,000). No meeting to attend in 2020
ERAPPA meeting expense	-	has not been historically used; eliminated
Printing & Postage	1,500	3 yr avg \$1,623; 17/18 had \$285 expense for treasury records to Phillip
Marketing	500	significant variance yr to yr; no expense last 3 years
Insurance	4,100	3 yr avg \$3,187; 17/18 prepaid theft ins for 3 years. Includes cost for next policy in January
Incorporation	25	\$25 fee plus \$5 processing. No processing fee online.
Board Meeting - Winter	35,000	3 yr avg \$19,362. (2020 MYM canceled which is reflected in a lower 3 yr average)
Board Meeting - Summer	14,500	3 yr avg \$9,036 (2020 summer meeting held online, reducing 3 yr average)
Board Meeting - Annual	-	3 yr avg \$18,468; No meeting to attend in 20-21
Bank Fees	150	3 yr avg \$335. Canaceled credit card gateway account saving \$240/year.
Accounting Fees	15,000	3 yr avg \$10,435
Software Fees	480	QuickBooks went from \$30 to \$40/mth in 19/20
Dues collection (APPA)	17,500	10% of dues; 3 year avg \$16,449; last 2 years trending towards \$19,000. Expecting less dues collection.
Annual Meeting Expense	-	\$10,552 in 2017-18 due to write-off of 2017 seed money and AM VP travel
Commission & Service Fees (Travel)	-	Eliminated in 2018-19. Fees now included in costs for each meeting/committee.
Tele-Conference	1,500	3 yr avg \$3,647. Expecting to eliminate early in 2020 FY. Using MS Teams instead.
sub-total	<u>90,755</u>	

Technology & Communication

Web Review & Development	10,000	3 yr avg \$22,616 includes two years of web site upgrade expense that will not be incurred in 20-21.
Microsoft Office 365	715	\$65/person for 11 people. Switch from Dropbox to MS Office 365
Technology & Comm Mtg	9,900	11 @ \$900; 3 yr avg \$765 each
ERAPPA Communication	1,000	3 yr avg \$925
sub-total	<u>21,615</u>	

Awards/Scholarships

Scholarships - Leadership Acad.	24,000	Unchanged. AIFM opportunities unknown for 2020-21. Six scholarships approved for 19-20 @ \$4,000
Credentialing Scholarship	45,000	ERAPPA board voted 9-28-18 to set at \$45,000/yr. Board voted June 2019 to up to 90,750 for FY 19-20 only
Ambassador Scholarship Top-up	-	New in 14-15 covering gap in Sponsor & Actual cost, not used last 3 yrs
Student Ambassador scholarship	-	eliminated; conference sponsorship opportunity
Awards	3,000	3 yr avg \$3,100
sub-total	<u>72,000</u>	

Professional Development

Misc P.D. Program Expenses	1,100	\$1,050 in 19-20 for AIA registration (annual registration)
Major Update of PD Materials	-	request when needed
Partners in Education Support	8,000	Ongoing support for speakers at Chapter meetings; 3 yr avg \$8,000
Professional Development Mtg	8,250	11 @ \$750; 3 yr avg \$518 each
ERAPPA Program Support	-	
Webinars	-	APPA cost now; was \$1,500 each; 4 per year
Toolkit sponsorship at Annual Meeting	-	Board voted in 17/18 to eliminate starting with 2020 annual meeting
ERAPPA A/M Grant	20,000	DVAPPA and NYAPPA have not requested yet for 2021 or 2022.
sub-total	<u>37,350</u>	

Total Operating Expense **250,670**

Net **(82,586)**

**ERAPPA Year-End Treasurer's Report
July 1, 2020– June 30, 2021**

The 2020-21 fiscal year resulted in a net financial profit in the amount of \$31,132. This is a 138% positive difference from the \$82,586 loss that was budgeted.

Revenue from membership dues was 23% more less than budgeted. Since we did not budget for annual meeting revenue in 2020, overall reduction in revenue is represented by the dues revenue reduction.

ERAPPA continues to make a significant investment in our members, expending \$44,205 in scholarships and credentialing coupons. Several scholarship recipients were unable to take advantage of the scholarships with no in-person training and limited virtual options. Those scholarships will be carried over into the 2021-22 fiscal year.

One chapter took advantage of the Partner's in Education (PIE) funding available, with a grant of \$2,000 awarded.

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, 2021, and the preparation and filing of the federally required annual 990 return.

The Mid-Year meeting in 2021 was not held due to the pandemic, so there were no expenditures for that, which represented a \$76,500 savings from the planned budget.

ERAPPA remains financially stable despite a difficult year. Accounts payable reflects money owed for a PIE grant awarded in 2020-21 but paid in the 2021-22 fiscal year, costs incurred for the June board meeting but not paid until the 2021-22 fiscal year, and a \$10,000 payable for accounting services incurred for the 2020-21 year but not yet billed.

Scholarships payable of \$13,790 consist of scholarships awarded but not yet used by June 30, 2021. There is deferred revenue \$27,216 for ERAPPA dues collected in 2020-21 by APPA for the 2021-22 fiscal year. There is no accounts receivable balance. On June 30, 2021, our cash balance was \$612,535 with prepaid expenses of \$6,040, prepaid scholarships of \$4,950 for an asset balance of \$623,525. This is a decrease in our current asset position of \$52,622 from June 30, 2020. Our net asset position of \$623,525 is an increase of \$23,503. The change in current assets vs. net assets is due to ERAPPA's continued investment in term-bound certificates of deposit and the interest they accrue, which is not considered current assets.

ERAPPA's strong cash position protected the organization because of the postponed annual meeting in fall of 2020. Despite this ERAPPA's net cash position improved and the organization remains financially strong and, in a position, to withstand any future financial difficulties posed by the unfavorable economic climate caused by the pandemic.

Respectfully Submitted;
Phillip Melnick CEFP, CRL
ERAPPA Treasurer

ERAPPA YEAR-END STATEMENT
July 1, 2020 - June 30, 2021

ITEM	BUDGET	Yr End TOTAL	Variance
REVENUE:			
Interest	2,500.00	1,149.07	(1,350.93)
Dues	165,584.00	127,424.83	(38,159.17)
Annual Meeting Proceeds	-	-	-
Sales (Misc Revenue)	-	-	-
TOTAL REVENUE	168,084.00	128,573.90	(39,510.10)
OPERATING EXPENSES:			
Uncategorized Expense	-	-	-
VP Annual Meetings			
Host Com Visits	1,000.00	-	1,000.00
Winter (Mid-Year) Meet - Co-hosts	6,600.00	-	6,600.00
Failed Meeting Expense	-	125.00	(125.00)
sub-total	7,600.00	125.00	7,475.00
VP Chapter Affairs			
Winter (Mid-Year) Meet - CA Comm.	9,000.00	-	9,000.00
sub-total	9,000.00	-	9,000.00
VP Membership			
Winter (Mid-Year) Meet - Mem Comm.	7,750.00	-	7,750.00
Membership Initiative	4,600.00	-	4,600.00
sub-total	12,350.00	-	12,350.00
Board - Administration			
Miscellaneous	500.00	300.00	200.00
Travel- ERAPPA Annual Meeting	-	-	-
Travel - APPA Annual Meeting	-	-	-
Printing & Postage	1,500.00	30.67	1,469.33
Marketing	500.00	-	500.00
Insurance	4,100.00	3,093.09	1,006.91
Incorporation	25.00	25.00	-
Board Meet - Winter (Mid-Year) Meet	35,000.00	-	35,000.00
Board Meet - Summer	14,500.00	6,801.41	7,698.59
Board Meet - Annual	-	-	-
Bank Fees	150.00	-	150.00
Accounting Fees	15,000.00	15,925.12	(925.12)
Software Fees	480.00	480.00	-
Dues Collection Fees	17,500.00	12,742.49	4,757.51
Annual Meeting Expense	-	2,500.00	(2,500.00)
Commissions & Service Fees	-	-	-
Ad-Hoc Meetings - Conference Calls	1,500.00	359.89	1,140.11
sub-total	90,755.00	42,257.67	48,497.33
VP Technology-Communications			
Web Review & Development	10,000.00	6,566.41	3,433.59
Dropbox - Professional	715.00	-	715.00
Winter (Mid-Year) Meet - T&C Comm.	9,900.00	-	9,900.00
ERAPPA Communication	1,000.00	925.27	74.73
sub-total	21,615.00	7,491.68	14,123.32
Awards / Scholarships			
Scholarships & Expenses	24,000.00	10,825.00	13,175.00
Credentialing Scholarship	45,000.00	33,380.00	11,620.00
Ambassador Scholarship Top-Up	-	-	-
Student Ambassador Scholarship	-	-	-
Awards	3,000.00	307.69	2,692.31
sub-total	72,000.00	44,512.69	27,487.31
Professional Development			
Misc. Prof Develop. Expenses	1,100.00	1,055.00	45.00
Partners-in-Education Support (PIE)	8,000.00	2,000.00	6,000.00
Winter (Mid-Year) Meet - PD Comm.	8,250.00	-	8,250.00
PD Webinar Expense	-	-	-
Annual Meeting Grant	20,000.00	-	20,000.00
Toolkit Sponsorship at Annual Meeting	-	-	-
sub-total	37,350.00	3,055.00	34,295.00
Expenses Total	250,670.00	97,442.04	153,227.96
NET	(82,586.00)	31,131.86	113,717.86

**ERAPPA Proposed Budget Treasurer's Report
July 1, 2021 – June 30, 2022**

For the fiscal year 2021-22 the ERAPPA Board is proposing an operating budget that will result in a year-end operating loss of \$186,050. This loss is due primarily to the absence of annual meeting revenue in 2021 and to covering the failed meeting expenses for the 2021 host committee as was done in the 2020-21 budget cycle.

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 ninth 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. This year, due to the pandemic, we once again postponed the annual meeting and are projecting no annual meeting revenue in the budget. While this is a significant reduction in revenue, it is something that ERAPPA is well-positioned for due to excellent stewardship of ERAPPA's financial resources by the board through the years.

In this budget, the Board continues to support continuing education for our members. In 2021-22 ERAPPA will be awarding:

- educational scholarships with a total value of \$44,500, for virtual and in-person (we hope) learning opportunities.
- CEFPP credentialing coupons valued at \$45,00, to continue offering our membership the incentive to obtain their certified educational facilities professional certification.

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.

Continuing in 2021, a grant of \$10,000 will be available to host committees, replacing previously provided seed money, which will not need to be repaid.

This budget once again is forecasting a planned deficit like the 2020-21 budget. While we anticipate a significant financial loss this year, the organization's financial health remains strong, allowing the board to not increase the membership dues rate. It is important to note, at the June 2021 summer meeting, the Board exhaustively reviewed budget, ensuring each expense item is required, managed and reasonable. This budget is one in a ten-year cycle, based on rotating meeting locations. Despite a second year without an annual meeting and the revenues from that to sustain the organization, rest assured the Board is carefully managing and updating this 10-year budget cycle for you our members, safeguarding the financial stability of ERAPPA.

Respectfully Submitted,
Phillip Melnick, CEFPP, CRL
ERAPPA Treasurer

ERAPPA BUDGET		
July 2021 - June 2022		
REVENUE		
Interest - Savings Account	1,000	Reflects reduced interest rates which have fallen due to the pandemic
Membership Dues	148,525	Gross Dues; 95% of 3 year avg
Annual Meeting Proceeds	-	2021 Annual Meeting was postponed to 2024 due to pandemic
Refund - ERAPPA Prog Support	-	Repayments are recorded against receivables and not actual revenue
Total Revenue	149,525	
Operating Expense		
Annual Meetings		
Expenses and Travel	6,600	6 committee members at \$1,100; 3 yr avg \$1,021 each
Host Committee Visits	1,500	previous 3 year average \$1546. Includes 2 years of Canadian travel.
Failed Meeting Expense	70,000	Anticipated cost to cover failed 2021 Annual Meeting expense
sub-total	78,100	
Chapter Affairs		
Travel - Chapter Meetings	-	eliminated in 15-16, contact is made at MYM
Chapter Affairs Comm Mtg	9,000	10 @ \$900; 3 yr avg \$897 each
sub-total	9,000	
Membership		
Membership Comm Mtg	7,750	10 @ \$775; 3 yr Avg Is \$758 each
ERAPPA Membership Initiative	4,600	Last 3 yr avg is \$3,618, Board approved \$4,600 in July 2019 conference call
sub-total	12,350	
Administrative/Governance		
Miscellaneous expense	500	3 yr avg \$161
Travel - ERAPPA Annual Mtg	-	3 year avg is \$1602. No meeting to attend in 20-21
Travel - APPA Annual Meeting	-	3 yr avg \$4,224 (3 attendees @ \$2,000). No meeting to attend in 2020
ERAPPA meeting expense	-	has not been historically used; eliminated
Printing & Postage	1,500	3 yr avg \$1,623; 17/18 had \$285 expense for treasury records to Phillip
Marketing	500	significant variance yr to yr; no expense last 3 years
Insurance	4,100	3 yr avg \$3,811.
Incorporation	25	\$25 fee plus \$5 processing. No processing fee online.
Board Meeting - Winter	35,000	3 yr avg \$40,647. (2020 & 2021 MYM canceled which is not reflected in 3 yr average)
Board Meeting - Summer	14,500	3 yr avg \$11,407 (2020&2021 summer meeting held fully or partially online. Expecting fully in person in June 22)
Board Meeting - Annual	-	3 yr avg \$18,468; No meeting to attend in 21-22.
Bank Fees	150	3 yr avg \$134. Canceled credit card gateway account saving \$240/year.
Accounting Fees	18,000	3 yr avg \$17,907
Software Fees	600	QuickBooks went from \$40-50/month in 7/2021; \$30 to \$40/mth in 19/20
Dues collection (APPA)	17,500	10% of dues; 3 year avg \$15,634. Dues collection uncertain for this year.
Annual Meeting Expense	-	\$10,552 in 2017-18 due to write-off of 2017 seed money and AM VP travel
Commission & Service Fees (Travel)	-	Eliminated in 2018-19. Fees now included in costs for each meeting/committee.
Tele-Conference	500	3 yr avg \$2,830. Eliminated in fall 2020 FY. Using MS Teams instead.
sub-total	92,875	
Technology & Communication		
Web Review & Development	10,000	3 yr avg \$21,479 includes two years of web site upgrade expense that will not be incurred in 21-22.
Microsoft Office 365	2,500	\$65/person for 11 people. Switch from Dropbox to MS Office 365
Technology & Comm Mtg	9,900	11 @ \$900
ERAPPA Communication	1,000	3 yr avg \$925
sub-total	23,400	
Awards/Scholarships		
Scholarships - Leadership Acad.	44,500	Assumes 8 scholarships @ \$4,000, plus \$2,000 buffer, and \$10,500 for 35 VFS scholarships
Credentialing Scholarship	45,000	ERAPPA board voted 9-28-18 to set at \$45,000/yr. Board voted June 2019 to up to 90,750 for FY 19-20 only.
Ambassador Scholarship Top-up	-	New in 14-15 covering gap in Sponsor & Actual cost, not used last 3 yrs
Student Ambassador scholarship	-	eliminated; conference sponsorship opportunity
Awards	3,000	3 yr avg \$3,100
sub-total	92,500	
Professional Development		
Misc P.D. Program Expenses	1,100	\$1,050 in 19-20 for AIA registration (annual registration)
Major Update of PD Materials	-	request when needed
Partners in Education Support	8,000	Ongoing support for speakers at Chapter meetings; 3 yr avg \$8,000
Professional Development Mtg	8,250	11 @ \$750; 3 yr avg \$518 each
ERAPPA Program Support	-	
Webinars	-	APPA cost now; was \$1,500 each; 4 per year
Toolkit sponsorship at Annual Meeting	-	Board voted in 17/18 to eliminate starting with 2020 annual meeting
ERAPPA A/M Grant	10,000	
sub-total	27,350	
Total Operating Expense	335,575	3 year average \$272,963
Net	(186,050)	3 year average \$13,571

APPA Awards and Recognition Committee

Scott Albert

Slippery Rock University



During the 2018 – 2019 administrative year, a separate Awards and Recognition Committee was created outside of the Professional Affairs Committee. The Awards & Recognition Committee is responsible for recognition of the Effective and Innovative Practices (E&I) award, the Sustainability award as well as recognition of individual services and achievement by considering applications for such individual awards as the Meritorious Service, the APPA Fellow, and the Pacesetter award. The committee's recommendations are then sent to the APPA Board of Directors for final approval.

Unfortunately, Award submissions have significantly dropped between 2019 and 2021, from a total of 58 submissions in 2019, to 50 submissions in 2020 and 20 submissions in 2021.

Awards Review Activity:

	2020	2021
APPA Fellow	0	2
Meritorious Service	7	1
Pacesetter	5	3
Effective & Innovative Practices (E&I)	25	11
Sustainability	13	3

The committee met virtually on March 9, 2020, and March 1, 2021, to finalize award recommendations for APPA Fellow, Meritorious Service, Pacesetter, E&I and Sustainability. Awardees were recognized on the APPA website and in the July/August edition of APPA's Facilities Manager Magazine.

Sustainability Innovation Award

APPA's Sustainability Innovation Award in Facilities Management is designed to recognize and promote unique and innovative sustainable practices in the educational facilities and campus environments. It is awarded to educational institutions that have implemented programs and processes that enhance service delivery, lower costs, create a green and/or sustainable environment, or otherwise benefit the educational institution supporting student success and environmental stewardship.

2020

Auburn University (SRAPPA)
Brown University (ERAPPA)
Louisiana State University (SRAPPA)
Pennsylvania State University (ERAPPA)
University of North Dakota (CAPP)

2021

University of New Hampshire (ERAPPA)

Effective & Innovative Practices Award

APPA's Effective & Innovative Practices Award recognizes programs and processes that enhance service delivery, lower costs, increase productivity, improve customer service, generate revenue, or otherwise benefit the educational institution. Award nomination entries must describe either a new program or significant restructuring of an existing program or process.

2020

Oklahoma State University (CAPP)
 Purdue University (MAPPA)
 University of Massachusetts Lowell (ERAPPA)
 University of Nebraska Kearney (CAPP)
 University of Virginia (SRAPPA)

2021

California State University East Bay (PCAPP)

Meritorious Service Award

Each year, APPA members bestow the Meritorious Service Award upon the individual member or members who have made significant, life-long contributions to the profession of education facilities management. APPA's highest award for individual service, the Meritorious Service Award is given to no more than three individuals each year. Individuals must have been an active member of APPA for a minimum of ten consecutive years; attended and participated in meetings and other functions at the international level; and demonstrated continued and distinguished service to the association.

2020

Michelle Frederick (ERAPPA)
 Peter Strazdas (MAPPA)
 Daniel Wooten (SRAPPA)

2021

Elizabeth Clark, CEFP, Pennsylvania State University (ERAPPA)

Pacesetters Award

The Pacesetter Award is designed to encourage further participation in APPA among those who have already made significant contributions at the regional or chapter level. Up to seven Pacesetter Awards may be given each year.

2020

Nicole Sanderson, University of Washington Bothell (PCAPP)

2021

Kim Case Nichols, CEFP, University of Nevada Las Vegas (PCAPP)

APPA Fellow

The APPA Fellow designation brings with it both recognition for specific accomplishments to date, and expectations for continued involvement in APPA's leadership program through research and mentoring. The Fellow is APPA's highest individual achievement award.

2021

J. Thomas Becker, PE, CEFPP, Thomas Jefferson University (ERAPPA)

APPA Membership & Community Engagement Committee

Marina Clayton-Therault

Dalhousie University



Membership – A Year (or two) of Many Transitions

The 2019-21 years were crucial years for membership at the national and regional levels. Across the entire membership, there has been an ongoing effort to retain our member institutions while amidst the COVID-19 pandemic. With a large, focused effort from APPA National level, combined with efforts from the Regional level (the ERAPPA Member and Community Engagement Committee) there has been considerable effort to reach out to institutions to reinforce the value of membership in APPA in hopes to encourage institutions to renew their memberships. Many institutions are facing budget challenges which are having impacts on membership renewals.

Initiatives – Platform Building and Professional Development

APPA's strategic direction places a large focus on Community Engagement. Community Engagement refers to the process by which community and organizations collectively build ongoing, permanent relationships for benefits and outcomes. Another words, the relationships of our members and the knowledge and wisdom they share from their experiences is what makes a community; and, is what makes the APPA organization as a whole so valuable. However, the organization is not valuable if the knowledge the people have doesn't get shared amongst the community. In order to share knowledge, there must be a mechanism or medium in which the information can be shared by all. One of the largest initiatives for the Membership and Community Engagement Committee happened in the 2018-19 year when the new APPA Community platform was launched. This platform allows all members a means to share ideas within the community. During the past two years (2019-21) the Membership and Community Engagement Committee has been faced with the new challenge of getting the membership to use this platform. The success of the platform is in the hands of the membership and their power of sharing information with the rest, within the community. It is also imperative that the current membership takes every opportunity to market this new platform to both, engage more members in its use, and to encourage new membership to the region and organization.

Effectiveness - The role of the M & CE Liaison

A concentrated effort at the chapter and regional levels is always required in order to continue the good work of the organization. The current members are reaping the benefits of the organization and are the best form of marketing, recruitment and retention for the organization utilizing professional development as its basis. As the liaison to the APPA Membership and Community Engagement Committee I will continue to work diligently with the APPA office, and national Membership and Community Engagement Committee to provide our region with the data and information to assist chapters in making recruitment and retention, through engagement, a priority. Together we can and will grow our membership for future years to come.

Membership Status Reports

Each region liaison has the ability to create reports from the APPA data base to know unpaid members, paid members and types of memberships; as well as those who have been dropped. ERAPPA is a very large region in numbers (institutions, Business Partners etc.) which has made efforts to contact these masses very challenging for renewals before the drop date (especially during this last couples of years while staff have been remotely working during the pandemic). The engagement of these institutions and business partners to encourage renewal membership requires effort from the entire membership in order to be successful. The M & CE Committee at both the National and Regional levels will continue its efforts to review all membership statuses and plan activities that will draw inactive members back to the community.

Special Thanks

I would be remiss if I didn't share our committees thanks to all the staff at the National level of APPA for their continued administrative support, as we continue our work to persuade current members to renew; and, new members to join this organization, all the while transitioning through a restructure of the APPA organization. Countless hours were invested by the National staff in making calls to our membership who hadn't renewed before the deadline and even after. Also, to Kristin Witters, Director of Member and Committee Engagement, who is very supportive of membership liaisons, providing us with all the tools to get up-to-date data on our regions at any time. Thank you for the opportunity to represent ERAPPA on the APPA Member and Community Engagement Committee.

APPA Information and Communication Committee

John Moore

Rochester Institute of Technology



The Information & Communications Committee (I&C), formerly known as Information and Research Committee, serves as stewards for the integrity, growth, and dissemination of the association's collective body of knowledge.

In advancing the Strategic Plan's vision of Continuous Learning, the committee monitors and evaluates the ease and effectiveness of information storage and retrieval for members pursuing individual, on-demand, and self-paced learning and discovery.

ERAPPA was well represented on the committee in 2019. In addition to Jason Sawyer, the ERAPPA Representative, Darryl Boyce and Norm Young served as At-Large members.

Highlights of this year's activities:

1. Content Management System/Website Update

An upgrade to the website was completed which required a detailed look at the current content available on the site, including how one navigates within the site.

The I&C committee took the lead on enhancing the content and 1) developed a cross committee team to recommend strategies and goals for our content, 2) conducted a survey of the APPA Board, APPA committees, and APPA staff on the functionality and features of the website, and 3) created a new site using a contractor on the WordPress platform with heavy reviews from the I&C Committee.

2. The Body of Knowledge (BOK)

The Body of Knowledge (BOK) is the core and foundational APPA information asset. Following the value proposition of Adapt, the BOK content, delivery, and exposure are prime for review. Recently, APPA has provided limited open review of BOK content by non-APPA membership.

The I & C took a look at the current articles and determined that some need updating, and we may have an opportunity to revamp the BOK to provide a more nimble and useful resource. The Committee plans to brainstorm and evaluate how we can improve the BOK this coming year.

Content Coordinators

Part 1: General Administration and Management

Victor Pesiri

Brentwood School

Part 2: Operations and Maintenance
Chris Kopach, CEFP
University of Arizona

Part 3: Energy, Utilities, and Environmental Stewardship
Content coordinator being sought.

Part 4: Planning, Design, and Construction
Steve Maruszewski, CEFP, UNT SYSTEM

3. Center for Facilities Research (CFaR)

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

Recently completed:

- Managing Trees on Campus: A Survey of North American College and University Tree Care Practices and Operations [2019] Mikaela Schmitt-Harsh, Ph.D., James Madison University

Research still in process:

- Planned Preventive Maintenance – Decision Support System
Theodore J. Weidner, Ph.D., P.E., AIA, F.ASCE, DBIA, CEFP, Purdue University; with Dr. Soojin Yoon, Purdue University
- Custodian Impact on Student Success
Steven D. Gilsdorf, CEFP, Western Michigan University
- Multi-Criteria Decision-Making Models for Repair and Replacement Decisions of Condition-Based Building Maintenance
Deniz Besiktepe Karaman, B.Arch., M.Sc., Ph.D. Student, Colorado State University
- Measuring the Current Practices of Total Cost of Ownership (TCO) Principles Used in the Procurement of Flooring in Higher Education
Jeffrey L. Campbell, Ph.D., Brigham Young University (retired)

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. The forthcoming FPI 2.0 version of the survey, which will improve and somewhat reduce the survey, as well as using Tableau software for data report visualizations.

For the 2017-2018 survey, there was a decrease in the number of both private and public institutions participating. Thirty-nine (39) private institutions participated, and 215 public institutions participated in the 2018 survey cycle.

All APPA regions are represented in the report, with the largest number of respondents coming from the Midwestern region (MAPPA), Southeastern region (SRAPPA), and the Pacific Coast region (PCAPPA). There were no international participants this year. ERAPPA had 23 respondents out of the 250+ entries.

For the 2018-2019 Survey, APPA's Information and Communication Committee's goal for this year were to enhance the survey and reporting tools by making them both more navigable, user-friendly, and accurate. We have made significant progress with all of these initiatives. APPA also automated many of the internal processes for the survey and report, which will result in a better-quality product that can be delivered faster and with more accuracy. APPA will continue to make improvements based on participant feedback, and we welcome any thoughts or comments you would like to provide.

For the sixth year, APPA and NACUBO (National Association of College & University Business Officers) are collaborating to raise consciousness over several basic key facilities metrics including energy, electrical, water, waste stream, and carbon footprint.

5. Publications

Numerous publications are available through APPA's Bookstore but listed below are some of the highlights.

- Operational Guidelines Trilogy revision – We will be producing a new edition of all three publications (custodial, grounds, maintenance) and have task force teams and authors for the content and work loading teams to do new calculations for the levels of service. Tom Becker of Thomas Jefferson University serves as the project's editor-in-chief.
- APPA 1000-1 Total Cost of Ownership for Facilities Asset Management (TCO) – Part 1: Key Principles [PDF].
- Total Cost of Ownership for Facilities Asset Management (TCO) – Part 2 is in draft and under review.

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

“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 2019 Rex Dillow Award is Steven D. Gilsdorf from Western Michigan University, for the article “The Custodian’s Role in Student Success” in the November/December 2018 edition.

7. APPA Student Internship Program Development

APPA and its community have been focused on growing our profession and ensuring the next generation has a good foundation in Facilities. APPA member colleges, universities, schools, and other educational facilities are encouraged by APPA to establish facilities-related internship programs and to make them available for the students who are seeking hands-on professional experience in the field of educational facilities.

- Kristie Toohill is leading an APPA Student Internship Program Task Force working through the I&C Committee.
- The Task Force has developed a student internship program designed to accommodate non- academic internships and academic program-based internships.
- Internships are now live on the APPA webpage.

8. Facilities Manager Publication and SFO Bulletin/Inside APPA

The January / February 2019 Facilities Manager (FM) publication achieved a historic milestone transitioning from a print to electronic publication. FM is a vital information, marketing, and revenue element of APPA.

Concurrent to the FM publication is the review and continuous improvement of the Inside APPA newsletter. The Inside APPA newsletter is a frequent e-publication of information sharing, linking to APPA internal and external resources.

Atlantic Provinces Chapter

AAPPA

Craig Hickey, Chapter President
University of New Brunswick



1. The Leadership

President	Craig Hickey	University of New Brunswick
VP Membership / Treasurer	Marina Clayton-Therriault	Dalhousie University
VP Professional Development	Kris Kierstead	New Brunswick CC
VP Communications / Secretary	Tom Gilmore	University of New Brunswick

2. Chapter Governance

Following our AAPPA By-laws, the positions of President and VP Professional Development were up for renewal in May of 2020. Due to the COVID-19 Pandemic, it was decided to cancel the Spring Business Meeting for 2020 and forgo the election process, extending all executive positions for one year. This was supported by the Chapter membership. In June of 2021, a virtual Spring Business Meeting and election was held. Craig Hickey re-elected for a second term as President. Neil MacEachern had been serving in the position of VP Professional Development and decided not to re-offer for a second term. An election was held for this position with 2 candidates expressing interest. Kris Kierstead was voted in as the successful candidate.

3. Chapter Events

Due to the Pandemic, no in person events have taken place since our fall conference in November of 2019. Where AAPPA was scheduled to host the ERAPPA 2020 Annual Meeting, a fall conference was not planned for last year. Unfortunately, ERAPPA 2020 had to be cancelled due to the pandemic and has been rescheduled for 2023 in Saint John, NB.

The annual Spring Business Meeting was hosted as a virtual meeting this year on June 24th. The meeting was attended by 14 of our member institutions. It was good to reconnect with many of our AAPPA colleagues.

4. Chapter Events Planned

Due to the ongoing uncertainty and risk with the Pandemic and what travel restrictions may be in place for Fall 2021, it has been decided that our traditional in person conference would not proceed this year. Plans are in the works to host a virtual event for November and include professional development sessions and a keynote speaker. Hopefully, the 2022 spring business meeting can be an in-person event and will be held at a campus of the New Brunswick Community College next May if it safe to do so. Exact locations and dates are to be determined.

AAPPA will host the rescheduled ERAPPA 2023 Annual Meeting in Saint John NB. The conference theme is "Vision" and will be held at the Saint John Trade & Convention Centre, the Hilton Saint John and the Delta Saint John.

5. Membership

The Chapter's current Institutional membership is 17 total members. The chapter does not have a formal Business Partner Membership plan in place. Business Partners can become involved in chapter events by providing a sponsorship for the event. This has allowed the chapter to offer a no fee registration to attend the spring meeting and keep the cost of attending the fall conference at a reasonable level.

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. With no AAPPA events occurring since fall of 2019, this has been placed on hold until training events resume.

7. Major Initiatives

No update.

8. Major Areas of Concern

No update.

Delaware Valley Chapter DVAPPA

Andy Feick, Chapter President
Swarthmore College



1. Chapter Leadership

President	Andy Feick	Swarthmore College
Vice President	Craig Roncace	University of Pennsylvania
Secretary	Chris Andreozzi	Thomas Jefferson University
Treasurer	Amber Donato	Moravian College
Professional Development	John Camusi	Villanova University
Membership	Tyrone Dunston	Swarthmore College
Technology & Communications	Brett Fulton	Muhlenberg College
Webmaster	Brett Fulton	Muhlenberg College
Business Partner Liaison	Leslie Whitby	Stantec

2. Chapter Governance

Stabilizing the DVAPPA Board was a high priority after several losses of Board members to other jobs outside higher ed left Andy Feick serving as interim president (from membership to interim VP to interim president) and vacancies in the Secretary and Vice President positions. We recruited Craig Roncace from University of Pennsylvania and Chris Andreozzi from Thomas Jefferson University to serve as interim Board members in both of those roles. Following our spring election, all three have been installed as elected Board members.

Craig and Chris were two, key recruits, as the chapter had wanted to engage two more of our largest area universities in DVAPPA and on The Board. With Temple University having Jon Brighton as 2021 ERAPPA Conference co-chair, we now have three of the four largest higher education institutions in the chapter engaged. Chris was also a key recruit, as he is a new facilities manager and a recent graduate of Temple University's Facilities management program, thus bringing young talent to our Board.

3. Chapter Events

The Chapter was enjoying some terrific events prior to March's COVID shut-down. Temple University hosted our fall meeting in November in their stunning new library designed by Snohetta with Stantec as the Architect of Record. The event included a behind-the-scenes tour of the four-story robotic book retrieval system and the building's extensive mechanical systems.

Haverford College hosted our winter meeting in February and showcased an adaptive re-use of its historic library. Both events had a robust social and networking happy hour after the business meetings and educational component.

We have not had an in-person chapter event since the Haverford meeting. With the initiative of our Institutional Enhancement Committee of Business Partners, the chapter has hosted two virtual happy hours in an effort to keep the membership engaged.

4. Chapter Events Planned

To be completely frank, we have done little planning for future chapter events. The chapter institutional leadership has had little capacity for DVAPPA planning when most everyone's focus has been on the heavy lift of planning for and preparing to open their institutions for a COVID fall semester. Now that we are all settled in to our fall semesters we will be able to dedicate some time to mapping out chapter events. It remains uncertain as to when we will resume in-person events and it does not look like it will be any time during the 2020 – 2021 academic year.

It is worth mention that there has been a ton of institutional collaboration during COVID planning, especially with Villanova University hosting bi-weekly COVID planning calls that permit for an easy flow of information and Q & A relating to facilities COVID practices in chapter institutions.

5. Membership

Institutional Membership:

The Chapter's current institutional membership is 78 total members.

Business Partners Membership:

The Chapter's business partner membership is currently at 63.

Just before COVID, Chris Andreozzi agreed to chair a few focus groups of young facilities professionals in order for the chapter leadership to gain a more complete understanding of how the organization can best support and be of value to young facilities professionals. This is an important effort because the DVAPPA Board is interested in how the chapter can remain relevant to future facilities leaders. This work will need to proceed virtually or we will decide to wait to initiate the effort until in-person meetings are safe and permitted.

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 1st and applications can be found on the DVAPPA website. The chapter has not awarded any scholarships this year, as future scholarship use and chapter financial strength remain opaque.

7. Major Initiatives

In addition to ERAPPA 2021 planning, the only major initiative is to figure out how to continue chapter functions in a COVID environment.

The Chapter now has a social media presence, follow us on LinkedIn, Twitter, Instagram and Facebook. Our goal now is to post to all platforms weekly.

8. ERAPPA 2021

Planning for the 2021 conference continues to meet milestone dates. The conference website is now live as well as the Business Partner sponsorship opportunities. The conference co-chairs, John Brighton and Leslie Whitby, in partnership with Yvonne Shaw from BTI, continue to work on planning and logistics for the fall 2021 conference in Valley Forge. All of the conference subcommittees are formed and actively pursuing their responsibilities.

9. Major Areas of Concern

Our chapter was stunned by the sudden loss of Glenn Smith, an emeritus Member. Glen was a treasured leader and friend within DVAPPA, ERAPPA and APPA.

Institutional participation remains our greatest challenge. Two years ago the chapter decided to discontinue institutional chapter dues and make all of the area institutions eligible for membership at no cost. This was a prophetic decision, given the increased fiscal pressure on institutions from COVID. We remain challenged, however, to have broad institutional representation at chapter functions.

Finally, the uncertainty of the 2021 conference in Valley Forge is a risk. The chapter is spending a large portion of its financial resources to prepare for the conference. Whether the conference can actually happen with COVID restrictions, whether institutions will be permitted to attend or can afford to attend, and whether business partners will see the value in sponsorship are all variables contributing to the risk.

MARYLAND-DC CHAPTER MD/DC APPA

Sheri Vucci, Chapter President
Smithsonian Institution



1. Chapter Leadership

President	Sheri Vucci	Smithsonian Institution
President-Elect	Jimmy Burcham	University of Maryland College Park
Past President	Kelly Geishauser	The Catholic University of America
Treasurer	Mary Grube	St. Mary's College of Maryland
Secretary	Colleen Kirby	Salisbury University
Third Term Director	Quajalyn Amos	University of Maryland College Park
Third Term Director	Jason Sawyer	Smithsonian Institution
Second Term Director	Charles Lavallee	The Catholic University of America
Second Term Director	Vacant	
First Term Director	Brad Newkirk	St. Mary's College of Maryland
First Term Director	Darryl Williford	Bowie State University

ERAPPA Vice Presidents

Technology	Jason Sawyer	Smithsonian Institution
Professional Development	Mary Grube	St. Mary's College of Maryland

ERAPPA Committee Representatives

Chapter Affairs	Kelly Geishauser	The Catholic University of America
Professional Development	Charles Lavallee	The Catholic University of America
Membership	Quajalyn Amos	University of Maryland College Park
Technology	Jason Sawyer	Smithsonian Institution

2. Chapter Governance

Bylaws were last revised June 2014. No changes since the last report. Bylaws were revised this past winter and await membership approval.

3. Chapter Events December August 2020 – July 2021

Board of Director Meetings & Conference Calls

- Planning Meetings:
 - April 7 & 8, 2021 - Planning Meeting to revise Bylaws and plan for future meetings.
 - All other board meetings outside of monthly conference calls suspended due to pandemic.
- Conference Calls (August 2020 – July 2021)
 - Monthly – noon on the first Monday of each month

Fall 2020 Educational Program. Our Spring Educational Program was cancelled due to the pandemic.

Spring 2021 Educational Program. Our Spring Educational Program was cancelled due to the pandemic.

NFM&T Annual Conference. The Chapter is annually invited to host a free booth at the National Facilities Management & Technology Expo (NFM&T) in Baltimore, Maryland. Board members staff the booth in shifts for 3 days attempting to recruit new members and make others aware of the entire APPA organization. The Expo was initially postponed and ultimately cancelled this year due to the pandemic

2021 Annual Two-Day Chapter Educational Program. This would have been the Chapter's 20th Annual Summer Program. Held each year in June at the Rocky Gap Lodge in Flintstone, MD. The program was initially postponed until November 2020 and ultimately moved to June 2022 due to the pandemic.

4. Chapter Events Planned 2020 - 2021

Fall Educational Program: The Chapter is tentatively planning an in-person meeting in November 2021.

Spring 2022 Educational Program: no plans to date

2022 Annual Two-Day Educational Program. June 17 & 18, 2022

5. Membership

Our Institutional Membership numbers are holding steady. We continue to work at recruiting new members including K-12 and community colleges, and re-engaging institutions that have declined in participation. The majority of our attendees and members come from board member institutions.

6. 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.

7. Awards and Recognition

No update.

8. Major Initiatives

Membership. The Chapter continues to develop membership by establishing personal contacts and engaging institutions within the MD/DC region.

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

Technology. No new initiatives.

9. Major Areas of Concern

None at this time

New York Chapter NYAPPA

Kim Nelson, Chapter President
SUNY New Platz



1. Chapter Leadership

President	Kim Nelson	SUNY New Paltz
1 st Vice President	Rex Giardine	SUNY ESF
2 nd Vice President	Gary Goss	St Rose
Secretary	Zach Newswanger	SUNY Cortland
Treasurer	Mike LaPoint	Nazareth College
Professional Development	Andrew Germaine	Cornell University
Membership	George Stooks	St John Fisher College
Technology & Communications	John Moore	RIT
Webmaster	John Moore	RIT
Business Partner Liaison	Nick Cerro	C&S Engineering

2. Chapter Governance

In October we will be holding elections for Board Members openings

Pres-Rex Giardine

1st VP -Gary Goss

2nd VP-Open-Elections October Meeting

Secretary-Zach Newswanger

Treasurer-Mike LaPoint

3. Chapter Events

Winter Conference-March 25, 2021 Online with 200 participants

Summer Conference June 16-17, 2021 Online with over 300 participants

October Meeting-TBD

Monthly planning meetings for ERAPPA 2022 included SUNYPPAA

Bi-Weekly Meetings happening with all Committee Chairs.

4. Chapter Events Planned

All events have been held virtually for 2021

Hoping to have a onsite meeting in October at Turning Stone with a small group from ERAPPA Board. Still trying to figure that out through BI and ERAPPA Board

Winter Conference in Jan 2022-TBD Maybe online.

5. Membership

Working on NYC

6. Scholarships

No Update

7. Major Initiatives

- Growing Business Partner Diversity and Inclusion of NYAPPA business
- Working with Business Partners to develop meaningful training and marketing help to grow membership.
- ERAPPA 2022 Final contracts are signed for Turning Stone Resort at Vernon, NY In full planning mode and on target.
- Further development of the new website.
- Develop a schedule of drive-Ins and/or WebEx trainings quarterly. On hold due to pandemic.

8. Business Partner Relationship

- We have had a very engaged second year with Business Partner onboarding. They bring fresh outlooks and ideas to further our training line ups and deliveries.
- Due to COVID-19 we did not have the opportunity to onboard the 2nd Business Partner Board Member

9. Major Areas of Concern

- Events need to be trimmed down to open up the viability of a robust attendance roster and to cut back on cost to attend. What would a Hybrid look like?
- Travel Budgets at the Campus level.
- We continue to struggle with engaging facilities professionals to serve in Chapter leadership roles.
- Hiring quality employees in a shrinking talent pool.
- Shrinking population coming out of k-12 and more intense competition with other Colleges and Universities.

10. Finances and Chapter Dues

The NYAAPPA financial position remained strong at year-ended 2020. As the chapter does not collect membership dues, the only source of revenue was that generated through the ERAPPA conference. While our long-term financial plan is to draw down this retained equity to deliver and support professional development within our chapter. We have healthy investments to help sustain our organization.

ONTARIO CHAPTER OAPPA

Hugh Briggs, Chapter President
Lakehead University



1. Chapter Leadership

President	Hugh Briggs	Lakehead University
Past President	Paul Martin	Western University
Vice-President	John Witjes	Queen's University
Secretary	Brad Parkes	Laurentian University
Treasurer	Ron Ogata	York University
Energy Committee Chair	Nathan Splinter	Queen's University

ERAPPA Committee Representatives

ERAPPA Board	vacant	
Technology & Communications	Gordon Robins	University of Toronto
Chapter Affairs	Hugh Briggs	LakeHead University
Professional Development	vacant	
Membership	Ron Ogata	York University

2. Chapter Governance

There has been no change in the structure since the last report. In May 2019 Paul Martin has retired from Western and his position on the OAPPA board has come to an end. Paul continues to assist OAPPA as a conference planner and other ways as he can.

Due to COVID-19 OAPPA has extended the term of its existing officers for another year.

3. Chapter Events

- a. Directors
 - i. September 19, 2019 – at York University
 - ii. December 5, 2019 – at York University
 - iii. March 26, 2020 – ZOOM Meeting
 - iv. May 11, 2020 – ZOOM Meeting
- b. Energy Committee
 - i. September 18, 2019 – Ryerson University
 - ii. December 4, 2019 – Ryerson University
 - iii. April 1, 2020 – ZOOM Meeting
- c. Annual Conference
 - i. May 2020 – at University of Ottawa, postponed until May 2021

5. Membership

- a. Membership is stable and the participation rate is very good.
- b. OCFMA and OAPPA continue to hold joint meetings for the Energy Committees
- c. This year OCFMA and OAPPA are looking at how PD events can be adjusted to meet both the needs of the colleges and universities.

6. Scholarships/Awards and Recognition

Acknowledged and remembered the active participation of Rick Zalagenas, University of Waterloo who passed away on March 11, 2020.

7. Major Initiatives

- a. COVID 19
 - i. Shutdown of campus. Move to online delivery. Etc. Etc.
 - ii. Prepare for Fall 2020
 - iii. Need we say more?
- b. Deferred Maintenance Facilities Condition Assessment Program (FCAP)
 - i. Selected new vendor for assessments using OECM <https://oecm.ca>
 - ii. Worked with OCFMA to standardize our datatype.
 - iii. Provided Ontario Government MCU with updated data on FCAP.
 - iv. FCAP committee active to revitalize our data.
- c. Government Reporting
 - i. Energy reporting to various government ministries.
 - ii. Asset inventory of all buildings including # and type of flags.
- d. Lobbying the Ontario government on a number of issues:
 - i. Changes to the Lien and construction act - Prompt payment to contractors and sub-contractors
 - ii. Changes to the Waste and Recycling regulations.
 - iii. Changes to the Boiler and Pressure Vessel regulations.
 - iv. Changes to the definition of Class A accounts for electricity use.

SOUTHERN NEW ENGLAND CHAPTER SNEAPPA

Patricia Whitney, Chapter President
Framingham State University



1. The Leadership

President	Patricia Whitney	Framingham State University
Vice President	Jean Robinson	UMass, Lowell
Secretary	Jayson Davis	Bridgewater State University
Treasurer	Melissa Bergeron	UMass, Amherst
Past President	Chris Dupuis	University of Hartford
CT State Rep	Keith Woodward	Quinnipiac University
MA State Rep	Melinda Lamoureux	Bridgewater State University
RI State Rep	Douglas Michael	University of Rhode Island
Representative at Large	Jessica Abbott	Wolcott Public Schools
Webmasters	Peyton Gibson	University of Rhode Island
Business Partner Liaison	Maureen Dobbins	Hoffman Architects

ERAPPA Committee Representatives

Chapter Affairs	Patricia Whitney	Framingham State University
Prof. Development	Melissa Bergeron	UMass, Amherst
Membership	Glen Mathieu	University of Connecticut
Technology	Peyton Gibson	University of Rhode Island

2. Chapter Governance

Bylaws were last revised in 2008 and are currently under review for potential revisions. The COVID pandemic has caused a delay in this review. In an effort to recruit additional members into leadership roles, we have invited a few institutional members that have expressed interest in learning more about SNEAPPA to join to gain a better understanding of how our Board works and to have some insight into the roles of potential leadership positions they might consider in the future.

Board meetings and elections were held virtually this year due to COVID 19.

3. Chapter Meetings

The Chapter typically holds 3 meetings per year - Spring, Summer and Fall. Chapter meetings begin around 8am with registration, continental breakfast, and networking. Before the educational portion of the program begins, the Chapter President and other Board Members provide 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 the past 12 months, no meetings were held due to COVID-19. Our plan is to begin in-person meetings again, however, many campuses still have traveling restrictions so we will be look for new ways to connect with our membership.

Board meetings were held virtually.

4. Chapter Events

As mentioned above, we did not have any in-person chapter meetings last year. We will be working with new board to find ways to facilitate in-person meetings in the coming year.

5. Membership

Attendance – no updates for 2021.

6. Scholarships and Awards

The Joseph D. Rubertone Scholarship Program offers up to four (4) \$2,000 scholarships each year to the SNEAPPA membership to promote continuing education. None were awarded in 2020-21. We will review budget in the coming year to confirm availability of funding moving forward.

7. Finances and Dues

We do not charge an annual fee for membership which keeps participation inexpensive and easy. Additionally, we keep our registration fees low (typically under \$60-\$80/person) to help keep our educational offerings affordable to our members. This cost model allows multiple staff from a single institution to attend our meetings while still allowing us to sustain our chapter financially. Our board is evaluating ways to increase our annual revenue in order to keep meetings affordable while continuing to support our robust scholarship program and other important educational opportunities for our members.

8. Business Partner Relationships

Business Partners are welcome at all Chapter Meetings and we have had a Business Partner liaison participate in our Board meetings for several years now. The board will appoint a new one for the coming year in the next few weeks. The new sponsorship pilot was interrupted by COVID. The board plans to work on testing this program at future meetings. We will review and assess the program after each meeting, make any short term adjustments if necessary and make recommendations for a potential long term sponsorship program. We continue to communicate the importance of a low pressure culture and environment at our meetings with our Business Partners. In this respect, we hope to insure that our educational facilities attendees feel relaxed at the meetings.