



ANNUAL REPORT

To Membership

2021-2022



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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 University
Vice President, Technology and Communications	Jason Sawyer	Smithsonian Institution
Vice President, Chapter Affairs	Hugh Briggs	Lakehead 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	Leslie K. Whitby	Stantec

ERAPPA Reps to APPA Committees

Awards and Recognition Committee	Scott Albert	KAPPA
CLS Curriculum Development Committee	Robert Aldrich	NYAPPA
Communication Strategies Committee	Billy Gagnon	NNECERAPPA
DEI Taskforce	Andy Feick	DVAPPA
Membership Engagement Committee	Glen Mathieu	SNEAPPA
Rex Dillow Reviewer	Arthur Walsh	AAPPA

President's Message

Jessica Abbott, ERAPPA President

Wolcott Public Schools



Dear ERAPPA friends and colleagues,

It has been the greatest honor to serve as your ERAPPA President these past three years and during a time that completely disrupted life as we knew it. I remember thinking to myself in February/March 2020 that I wasn't ready for my year as President to already be half over – little did I know what was about to happen! We have all been through some trying times since we last gathered in 2019 and for me, my ERAPPA friends were my saving grace while facing unfamiliar challenges and starting a new job during the pandemic. One of ERAPPA's greatest strengths is its network, and I am so happy we are able to gather in person this year at ERAPPA 2022 to revitalize old connections, build new connections, and learn more about "What's Next?".

ERAPPA strives to be a key resource for the professional development of our members. Under the esteemed leadership of Mary Grube and with the support of APPA, we were able to continue to offer additional ERAPPA lunch & learn webinars, which are free to ERAPPA members. We have also continued our support of offering CEFP Credentialing coupons to ERAPPA members at no charge. The 2022 Host Committee and ERAPPA Professional Development Committee have worked tirelessly to put together a high caliber lineup of educational sessions for attendees of the annual meeting.

ERAPPA remains fiscally strong at this time, and we also remain 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 process became more important than ever during the pandemic when we had to cancel/postpone two annual meetings in a row and with the uncertainty of what degree of financial success future meetings would have. The Board is continuing to keep a close eye on long term financial impacts from the COVID-19 pandemic and we take our fiduciary responsibilities very seriously. At our June Board meeting we spent time looking our pro forma budget to understand what would have the biggest financial impact in the years to come and what we would need to carefully monitor. 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 and I am fortunate to have worked alongside them over the past three years. To my fellow Board members, thank you for your hard work, dedication, and willingness to stay the course with me during my seemingly endless tenure as President. Finally, a sincere thank you goes out to Rex Giardine, John Moore, and the entire 2022 Host Committee for their persevering efforts in planning and delivering a high-quality Annual Meeting.

Jessica Abbott

Wolcott Public Schools

ERAPPA President 2019 – 2022

Chapter Development Committee

Hugh Briggs, Vice President

Lakehead University



The ERAPPA Chapter Development Committee Representatives are:

Craig Hickey	President Atlantic Provinces	AAPPA
Brett Fulton	President Delaware Valley Chapter	DVAPPA
Scott Albert	President Keystone Chapter	KAPPA
Sheri Vucci	President Maryland-DC Chapter	MD/DC APPA
Earl Farrell	President New Jersey Chapter	NJAPPA
Jessica Picard	President Northern New England Chapter	NNECERAPPA
Kimberly Nelson	President New York Chapter	NYAPPA
John Witjes	President of Ontario Universities	OAPPA
Tim Schill	President of Ontario Colleges	OCFMA
Melissa Bergeron	President of Southern New England Chapter	SNEAPPA

Outgoing Members during 2019:

Andrew Wilson	VP Chapter Development	
Andy Feick	President Delaware Valley Chapter	DVAPPA
George Papuga	President Keystone Chapter	KAPPA
Joana DosSantos	President New Jersey Chapter	NJAPPA
Paul Campo	President Northern New England Chapter	NNECERAPPA
Hugh Briggs	President of Ontario Universities	OAPPA
Chris Dupuis	President of Southern New England Chapter	SNEAPPA
Patricia Whitney	President of Southern New England Chapter	SNEAPPA

CHAPTER LEADERSHIP

There has been a number of changes at the president's level in our chapters. We have six new members this year. The new group has already brought an increased level of enthusiasm and provide impressive leadership to their chapter constituents. The presidents are strong leaders and will represent their respective chapters well.

Andy Wilson has provided stellar leadership and a roadmap to success as VP Chapter Development and will be missed. We all thank Andy for this work on this committee.

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 continue 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.

While the past two years has been challenging for all, the chapters are engaged and reaching out to the membership through meetings, events and conferences to reinvigorate the membership. This in turn will produce a pool of prospective candidates for the chapters and the ERAPPA Board. The Presidents were successful in nominating a chapter champion candidate from each chapter.

FINANCIAL

Most institutions continue to have financial concerns and we are working on continuing to provide avenues for our membership to attend and participate in APPA related educational offerings. The educational scholarship program offered by ERAPPA is gaining momentum and has a fulsome group of candidates to choose from across our region.

CHAPTER MEETINGS

Attendance at chapter meetings has been a challenge in a virtual world. With the easing of restrictions and in-person meetings starting up again, attendance and participation has seen an increase. Please see chapter president reports for further detail on their chapter.

SCHOLARSHIPS

With the multitude of chapter, regional, and national **scholarships available**, we are proud that 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. All options are being considered and tried to keep the membership engaged and involved.

MID-YEAR & ANNUAL MEETING

This year's **Mid-Year Meeting** was held at Turning Stone, NY was a hybrid with both in-person and virtual attendance. The easing of restrictions made travel easier for some but not all. The continued easing of restrictions will hopefully bring about a full annual meeting hosted by NYAPPA in Oneida NY at Turning Stone Resort. Looking forward to seeing all of you in person this fall.

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 2021/2022:

None

Host Committee Liaison

Web Sites for Host Committees

- Provided guidance and support to ERAPPA 2022 host committee
- The 2020 and 2021 Annual Conference sites were migrated to the 2023 and 2024 websites.

ERAPPA.ORG Website

- Continued to support the ERAPPA website. We began adding webinar links to YouTube versus uploading the entire video in the members only area.
- Posted job vacancies when requested
- Continued to monitor traffic and try to improve hits
- Reviewed photos in the member only area for content

Website Contractor Support

- Requested the two delayed meeting sites be migrated
- Requested the events page be repaired as it was pulling old events from the chapter websites
- Requested a method to export the registered users from the website for auditing purposes
- Requested all older websites be archived

Benchmark Email

- Sent out six emails this year to the members informing them of new leadership with the ERAPPA board and the advertise upcoming events.

Chapter Websites

- The Committee considered adding a discussion board to the ERAPPA site but decided that discussion boards should remain at the Chapter level if the members are interested.

Webinars presented by ERAPPA

- The technology team supported educational webinars as they continued a series of free web sessions for ERAPPA members.

Scholarships

- Assisted with updating the scholarship forms and website language for ERAPPA members to apply. This included a workflow for the supervisors to approve the applicant's submission.

Microsoft Office/Teams

- We continued to support the Board and their use of the Microsoft Office tools

Future Initiatives

- Research a social media contractor to assist with our digital presence and to improve communications to the younger generations.

Member and Community Engagement Committee

Patty Smith, Vice President

Cabrini University



The ERAPPA Membership Representatives are:

David MacDonald	Atlantic Provinces	AAPPA
Vacant	Delaware Valley	DVAPPA
Brian Richardson	Keystone	KAPPA
Jim Burcham	Maryland/DC	MDDCAPPA
Joshua Johnson	New Jersey	NJAPPA
Tandra Boilard	Northern New England	NNECERAPPA
Gary Goss	New York	NYAPPA
Kathryn Brubacher	Ontario Colleges	OCFMA
Ron Ogata	Ontario Universities	OAPPA
Glen Mathieu	Southern New England	SNEAPPA
Nick Cerro	Business Partner Representative	NNECERAPPA
Lander Medlin	President & CEO	APPA

Outgoing members and vacancies during 2021/2022:

Tyrone Dunston	Delaware Valley	DVAPPA
Earl Farrell	New Jersey	NJAPPA
Kathy Kokin	Northern New England	NNECERAPPA
Melinda Lamoureux	Southern New England	SNEAPPA
Greg Lischke	New York	NYAPPA
Ron Ogata	Ontario Universities	OAPPA
George Papuga	Keystone	KAPPA
Marina Theriault	Atlantic Provinces	AAPPA

The Member and Community Engagement Committee welcomed 8 new members during 2021-2022. Glen, one of these new members also represented ERAPPA on the APPA committee responsible for member engagement.

Member and Community Engagement Committee Responsibilities

The ERAPPA Membership Committee's charge is to provide strategic guidance to aid in the recruitment, retention and growth of an actively engaged membership. This is done with the vision of providing ERAPPA members with the requisite knowledge, values and services to elevate the educational facilities professional, and to transform learning institutions.

The Committee continuously reviews membership data to ensure ERAPPA is reaching out to institutions and business partners who are not members of APPA and ERAPPA; to those who have not selected regional membership (APPA-only); and to re-engage members who have dropped their memberships.

The Committee works closely with other ERAPPA committees to ensure APPA and ERAPPA products and services are meeting the needs of members.

The Committee consists of representatives from each active ERAPPA chapter (and one member is appointed to serve on APPA's Membership Committee). The Membership Committee holds monthly conference calls and has two face-to-face meetings annually – one at the ERAPPA Mid-Year-Meeting (expenses covered by ERAPPA) and the other at the ERAPPA Annual Conference (expense borne by the member's institution.) Each Member is expected to provide feedback to their chapters on the activities, actions, and initiatives of the Committee, and to actively market and promote the value of APPA and ERAPPA membership.

Mission Statement - ERAPPA Member and Community Engagement Committee

The ERAPPA Member and Community Engagement Committee is organized for the purpose of maintaining proactive relationships with all categories of membership. The Committee will utilize the educational tools provided via chapter, regional, and national providers as we engage to become lifelong learners in our professional lives. We recognize that professional interaction will be the grass root effort as we maintain and grow the number of member institutions. Together with the ERAPPA Professional Development Committee, the M & CE Committee provides strategic guidance to our chapters to retain and grow an actively engaged membership and recommends to the Board strategies for growing ERAPPA membership and retaining current members. The Committee accomplishes this in part by working closely with APPA, the Chapters and by producing and approving annual member recruitment goals and strategy, and periodically reviewing and adjusting the goals as needed. The Committee, through its APPA Liaison, provides perspective on the needs and expectations of ERAPPA's membership and works in tandem with other ERAPPA committees to assist in meeting those expectations.

A. ERAPPA Virtual Business Meeting Replaced the Annual Conference

With the ongoing Pandemic environment across the world and in our backyards, holding an Annual Conference in 2021 was not advisable. The ERAPPA Board of Directors wisely initiated a Virtual Business Meeting. This initiative allowed for positive connectivity and attracted 191 educational and business partner participants. Participants were updated by members of the Board on September 21, 2021. At ERAPPA meetings, it is customary for participants to learn, network, and enjoy some SWAG. Pre-registered participants received an insulated lunch bag, a multi-function pen, and a notepad, all with ERAPPA logos. Member and Community Engagement committee members assisted with sharing the news of the Virtual Business Meeting and were most helpful at the Chapter level encouraging participation.

B. Scholarships and Recognition

With the postponement of the ERAPPA 2021 Conference, there were no Ambassador Scholarships awarded.

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 2021 ERAPPA Educational Scholarship winners were:

Chapter	Last Name	First Name	Institution/Program
AAPPA	Penny	Jason	Dalhousie/AIFM
AAPPA	Cory	Andrew	University of New Brunswick/ALA
DVAPPA	Becker	Mike	Muhlenberg/AIFM
DVAPPA	Andreozzi	Christopher	T. Jefferson & Sciences/AIFM
DVAPPA	Gruber	Nick	Muhlenberg/AIFM
KAPPA	Morgan	Todd	PENN State/ALA
MD/DC	Gonzalez	Yoandris	George Washington/ALA
MD/DC	Poplin	Adam	George Washington/ALA

C. ERAPPA Member and Community Engagement Committee Goal Achievement

- ✓ Awarded eight educational scholarships, with a primary focus of increasing the total number of applications received and broadening the number of chapters submitting applications.
- ✓ Contributed strong essays to the Membership Matters Section of the Facility Manager Publication.
- ✓ VP, Patty Smith contributed to the updated APPA Maintenance Standards Manual
- ✓ Supported the APPA Credentialing program through marketing at chapter level

D. ERAPPA Member and Community Engagement Goals

- ✓ Helping new attendees to leverage the most education from an ERAPPA Annual Meeting
 - Initiate a major change to help our newest members who attend the 2022 Annual Conference
 - Support this major goal using a proactive approach to newly registered attendees with an 8 point “touch”
 - The pre-conference outreach includes (1) a welcome letter from the VP, followed by (2) a phone call or email from their Chapter M & CE Committee member, followed by a (3) Webinar. At the Conference, (4) Committee members will be present at Registration to individually welcome each new attendee and assist with Guidebook, the lay of the land, etc. The traditional (5) First Time Attendee Reception remains a welcoming event where new attendees are introduced to the APPA/ERAPPA/Chapter leadership. Touchpoint (6) includes assisting new

attendees with the Hall of Resources and introducing them to their colleagues and Business Partners. The (7th) interaction is greeting and extending invitations to the FTA Breakfast tables on Monday morning. This may also extend to lunch or any other event that is included in the schedule. Again, offering to help the new attendees get to educational sessions, sharing knowledge of what to expect at the Tuesday Business Meeting, etc. #8, The last formal “touch” is a post-conference note to those who attended for the first time. The Committee would like to gain feedback from the process.

- ✓ Continue to grow the profession by encouraging each other and those at our campuses to participate in our local and regional chapters.

Professional Development Committee

Mary Grube, Vice President

St. Mary's College of Maryland



The ERAPPA Professional Development Representatives for 2021 -2022 are:

Kris Kierstead	Mount Allison University	AAPPA
Chris Andreozzi	Thomas Jefferson University	DVAPPA
Gregory Black	Millersville University	KAPPA
Quajalyn Amos	University of Maryland College Park	MD/DC APPA
Tim Pratt	Bates College	NNECERAPPA
VACANT		NYAPPA
Stepanka Elias	University of Waterloo	OAPPA
Lan Chi Nguyen Weekes	La Cite College of Applied Arts & Technology	OCFMA
Melissa Bergeron	University of Massachusetts	SNEAPPA
Amy Baker	New Jersey Institute of Technology	NJAPPA
Robert Aldrich	Hackley School	Representative to APPA PD Committee
Cristina Barnes	Stahl Schaeffer Engineering	Business Partner Representative

Outgoing members during 2021/2022:

John Camusi	Villanova University	DVAPPA
Charles Lavallee	The Catholic University of America	MD/DC APPA
Andrew Germain	Cornell University	NYAPPA
Neil MacEachern	Mount Allison University	AAPPA
Doug Michael	University of Rhode Island	SNEAPPA

The Professional Development Committee met once this year:

At the ERAPPA Mid-Year Meeting in Verona, NY:

The Committee continues its active involvement with and in support of the Host Professional Development Committee as we reviewed, selected, collaborated, and prepared for the five diverse tracks of educational programming for the upcoming two core days of the ERAPPA 2022 Annual Meeting September 18 – 21, 2022.

Conference calls have been held monthly and emails were exchanged with the committee throughout the year. The Professional Development Committee also meet several times throughout the year with ERAPPA 2022 Host Professional Development Committee to prepare for the educational sessions for the upcoming Annual conference.

ERAPPA Initiatives:

Lunch & Learn Webinars – ERAPPA's Lunch & Learn Webinars continue to be well received and well attended. Webinars were held in September 2021 (*ERAPPA Virtual Meeting*), November 2021 (*Data Driven Changes for Custodial Retention*), January 2022 (*Five Ways to Succeed in Succession Planning*), March 2022 (*What does DEI have to Do with It*), May 2022 (*Business Partners are from Mars and*

Institutional Members are from Venus), and July 2022 (How to Get the Most Out of Your ERAPPA Conference Experience).

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 2021 to June 2022, 38 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. Face-to-face offerings are now beginning to take place again.

APPA U – The Institute for Facilities Management and The Leadership Academy will be held September 11-15, 2022, in Providence, Rhode Island. This is the first face-to-face offering since the COVID-19 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.

Continuous Learning Offerings – APPA's new Continuous Learning Series (CLS) is aimed at providing more immediate access to the information, training, and peer-to-peer learning needed during this age of accelerations. It will enable facilities professionals to access the most relevant and current knowledge available on a wide range of topics and across a number of platforms and mediums.

Thought Leaders Series - APPA developed the Thought Leaders Series to conduct dedicated discussions on the future of higher education and the impact of that future on educational facilities. Since 2006, the annual Thought Leaders symposium and resulting monograph have addressed a variety of topics related to higher education and affecting the campus-built environment. APPA's Thought Leaders program is a component of the Center for Facilities Research (CFaR). The annual Thought Leaders symposium convenes representatives of colleges and universities from across the United States and Canada alongside association leaders, industry consultants, and education experts. The 2021 topic was, *Connections, Space & Place*. The 2022 topic is, *Diversity, Equity & Inclusion: An Organizational Imperative*.

Annual Meetings Committee

George Stooks, Vice President

St. John Fisher University



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 K Whitby	Stantec	DVAPPA	(2024)
Amber Donato	Moravian 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 all current and future 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.

It was refreshing this year to have an in person ERAPPA2022 mid-year meeting on site in Verona, New York. While not all attendees could be in person, hybrid solutions were deployed allowing various committee members to join in virtually. The nature of what we do as Facilities Professional dictates a need for flexibility on a daily basis and hybrid model while not ideal allowed the 1st mid-year meeting since 2019. We hope to see interest from institutional members for the annual conference in New York.

The host committee leadership from our AAPPA Chapter in Canada has re-engaged with an initial planning meeting for ERAPPA 2023 or as they have branded it as ERAPPA 2020+3. We look forward to seeing members of the host committee at the back in person after a successful MYM when they attend the annual meeting in New York as they build interest in ERAPPA2020+3. As a reminder the annual meeting next year is in St. John New Brunswick, from September 24-27, 2023. Plan on making the trip, in addition to great educational opportunities St. John New Brunswick is a great place to take a few extra days and see the sights.

ERAPPA 2021 is now scheduled to be in 2024 in Valley Forge, Pennsylvania and with the delay we have a new Co-Chair for the host committee. Amber Donato will be paired with Leslie K Whitby who is also now our business partner rep on the ERAPPA Board. I have every confidence that ERAPPA 2024 is in good hands

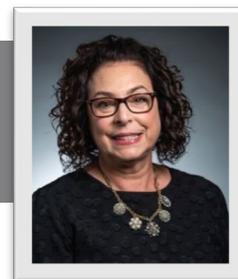
The strength and resiliency of all of host committees, our event planners, and the ERAPPA Board in adjusting to the circumstances over the past two year has been remarkable. Compliments and gratitude for all of your efforts, professionalism and of course lots of laughs as we worked through the roller coaster since just before our MYM in 2020.

As we look out into the future and regaining the momentum, we left Erie PA with in 2019 I encourage our members, especially those newer to our profession to get involved. 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, the friendships formed and professional network you will build will last throughout your career as a facilities professional. Who knows, some will last a lifetime.

Business Partner Representative

Leslie K Whitby

Stantec



Business Partner Representative

The Business Partner Representative on the ERAPPA Board of Directors chairs the Business Partner Committee. The incoming ERAPPA President appoints the Business Partner Representative for a one-year term, and they may be reappointed by successive incoming Presidents for a total of up to four consecutive terms. I am currently in my first term.

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

The Chairperson may remain on the Business Partner Committee at the conclusion of their Board service as a general member of the committee for the purpose of information sharing and continuity, like the role of a past-president.

Charge

The role of the Business Partner Advisory Committee is to identify and promote effective means of communication and support between ERAPPA Business Partners and ERAPPA Institutional Members to build and enhance mutually beneficial relationships. The Committee seeks to continually evaluate, validate, and promote the benefits of an ERAPPA membership and the value that participation can bring to members of the business partner community. To accomplish this charge, the Committee encourages and receives feedback from all Business Partners supporting ERAPPA and its various Chapters. Additionally, the Committee strives to offer creative thinking and innovative ideas that support the purpose and values of the Eastern Regional Chapter of APPA.

Expectations & Responsibilities of Committee Members

Each Committee representative should begin and continue their role with a passion for the work of the Committee and provide support for the Chairperson and other Committee members alike. As with other ERAPPA committees, there is the expectation of full participation to the maximum extent possible, in Committee meetings, held 10-12 times each year, primarily via conference/video calls. There are two face-to-face meetings per year; the first being the Mid-Year meeting in March, held at the same location as the fall Annual Meeting, with all expenses covered by ERAPPA, and the other is in conjunction with the ERAPPA Annual Meeting, at the committee member's/company's expense. There is an expectation for BP Committee members will make every effort to attend both face-to-face meetings. Additionally, each committee member should participate in their local chapter Board Meetings and share initiatives back and forth with eastern region, attend their local chapter meetings, and provide routine feedback to their boards on the activities, actions, and initiatives of ERAPPA's Business Partner Committee.

Committee Structure

Business Partner Representatives may be appointed by local Presidents that represent each of the active Chapters within the Eastern Region of APPA and serve a specified term, usually two years. Incoming presidents, at their discretion, may choose to appoint a new Business Partner Representative, continue with the current BP representative, or fill the position as specifically defined through local chapter by-laws.

Our current members shown with their respective chapters below:

DVAPPA / ERAPPA	Leslie K Whitby, Chairperson	Stantec
DVAPPA	Meaghan Finney	Voith & Mactavish Architects
KAPPA	Cristina Barnes	Stahl Sheaffer Engineering
SNEAPPA	Renee Driscoll	AZ Corp
MD/DC APPA	Vivica Williams	archSCAN, LLC
NYAPPA	Nicholas R. Cerro	C & S Companies

We currently have vacancies for the following chapters:
NNECERAPPA | OCFMA | AAPPA | OAPPA

Term Limits

The ERAPPA Board determined that local Chapters should established the length of term. Two-year terms are currently consistent across participating chapters.

Committee Initiatives (Ongoing)

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

Business Partner Membership Benefits

There is a need for stronger, tangible BP benefits to improve BP participation. We continue to have discussions to development tangible BP benefits. Beyond the obvious networking and camaraderie experienced at the conference, we identified a need for tangible, meaningful benefits. On January 11, 2018, the Board approved the following benefits:

- Opportunities to present relevant educational programs at our Annual Conference. (Selections are made through a "Call for Papers" process.)
- Opportunities for increased recognition through sponsorship of the ERAPPA Annual Meeting. Business Partner members receive exclusive advanced release of sponsorship opportunities.
- Early booth selection offered to members only.
- Through our “Webinar Lunch and Learn” program, BPs will have additional opportunities to present relevant educational content offered exclusively to ERAPPA Institutional membership throughout the year. Selections are made through a “Call for Papers” process.

- Assistance from our Professional Development Committee to have BP educational content reviewed for Continuing Education Units (CEU) potential, through direct access to our contracted AIA Reviewer. (Applicable for Annual Conference and Webinar programs only.)
- Our membership is like no other when it comes to open, collaborative networking. Ask any ERAPPA current Business Partner Advisory Committee members and they will tell you that through participation BPs will build connections with facilities professionals in the educational marketplace and increase their professional network.
- Through our educational sessions and programs, BPs will remain current with interests, innovations, and trends that impact facilities administrators in education.

During the 2018-19 Term, the BP Committee strategized about how to create specific benefits and areas for improvement associated with the Annual Conference. These include:

- Increased Traffic to Resource Hall
- Opportunities for “real” conversation time
- Revamping the conference schedule
- Allow for unscheduled time to connect with clients (potential solutions):

The Committee will continue to develop potential solutions and will present to the Board for consideration once further developed.

BP Chapter Representation

This year was the year of relationship building. As a part of this process, we placed emphasis on connecting our BP Reps to their local chapters, and encouraged our local chapters to appoint and engage a BP Rep. I am pleased to report that MD/DCAPPA is our newest local chapter to develop a BP membership program. They will be appointing a representative for their chapter, who will already be participating on the ERAPPA BP Committee.

Webinars

The Business Partner Committee determined the importance of building relationships with institutional members and created a theme of “Building Relationships” for 2022/2023. This is particularly important with both BP and institutional members returning to the office. Our goal is to host two webinars in 2023. For the 2022, we hosted the following webinars:

- | | |
|------------|--|
| 05/19/2022 | Business Partners are from Venus and Institutional Members are from Mars panel discussion. |
| 07/21/2022 | How to get the most out of your ERAPPA conference. |

It has been my pleasure to serve as the ERAPPA Business Partner Liaison to the Board.

Treasurer's Report

Phillip Melnick, Treasurer

Penn State University



ERAPPA Year-End Treasurer's Report July 1, 2021 – June 30, 2022

The 2021-22 fiscal year resulted in a net financial loss in the amount of \$125,128.68. This is 32.7% less than the \$186,050.10 budgeted deficit.

Revenue from membership dues was 23% less than budgeted. We did not budget for annual meeting revenue in anticipation of the 2021 Annual Meeting not being held, which is what happened. Total revenue was \$3,393.97 less than projected. Despite dues being less than anticipated, we unexpectedly received refunds for air travel that was booked for the 2020 mid-year meeting in St. John that was not held.

ERAPPA continues to make a significant investment in our members, expending almost \$74,000 in scholarships and credentialing coupons. Several scholarship recipients from 2021 were unable to take advantage of the scholarships with still limited training opportunities, while others deferred from 2020 took advantage of virtual offerings. Those scholarships that were not used in 2022 will be carried over into the 2022-23 fiscal year.

Three chapters took advantage of the Partner's in Education (PIE) funding available, with a grant of up to \$2,000 awarded to cover speaker expenses for their chapter meetings.

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, 2022, and the preparation and filing of the federally required annual 990 return.

The Mid-Year meeting in 2022 was held for the first time in 2 years. Total expenditures were \$55,780, which is less than budgeted, due in large part to many committee members participating virtually. Accounts payable reflects money owed CFP coupons purchased, reimbursement for board travel, and costs for accounting services incurred for the 2021-22 audit and tax preparation but not yet paid. Scholarships payable of \$33,940 consist of scholarships awarded but not yet used by June 30, 2022. There is deferred revenue \$34,687 for ERAPPA dues collected in 2021-22 by APPA for ERAPPA's 2022-23 fiscal year. There is no accounts receivable balance. On June 30, 2022, our cash balance was \$526,629 with prepaid expenses of \$7,684, prepaid scholarships of \$11,550 for an asset balance of \$545,863. This is a decrease in our current asset position of \$77,632 from June 30, 2021.

ERAPPA remains financially stable after enduring another difficult year. Despite the postponement of our second straight annual meeting in 2021, ERAPPA remains financially healthy with a current asset position that offers stability in difficult economic times. The ERAPPA board remains vigilant in protecting ERAPPA's financial health as we navigate through the impacts caused by the pandemic and widespread institutional budget retrenchment regionally and nationally in higher education.

ERAPPA YEAR-END STATEMENT
July 1, 2021 - June 30, 2022

2022

ITEM	BUDGET	Yr End TOTAL	Variance
REVENUE:			
Interest	1,000.00	215.58	(784.42)
Dues	148,524.90	113,923.82	(34,601.08)
Annual Meeting Proceeds	-	-	-
Sales (Misc Revenue)	-	31,991.53	31,991.53
TOTAL REVENUE	<u>149,524.90</u>	<u>146,130.93</u>	<u>(3,393.97)</u>
OPERATING EXPENSES:			
Uncategorized Expense	-	-	-
VP Annual Meetings			
Host Com Visits	6,600.00	6,795.06	(195.06)
Winter (Mid-Year) Meet - Co-hosts	1,500.00	449.19	1,050.81
Failed Meeting Expense	70,000.00	49,949.79	20,050.21
sub-total	<u>78,100.00</u>	<u>57,194.04</u>	<u>20,905.96</u>
VP Chapter Affairs			
Winter (Mid-Year) Meet - CA Comm.	9,000.00	8,864.66	135.34
sub-total	<u>9,000.00</u>	<u>8,864.66</u>	<u>135.34</u>
VP Membership			
Winter (Mid-Year) Meet - Mem Comm.	7,750.00	12,602.82	(4,852.82)
Membership Initiative	4,600.00	4,339.13	260.87
sub-total	<u>12,350.00</u>	<u>16,941.95</u>	<u>(4,591.95)</u>
Board - Administration			
Miscellaneous	500.00	9,682.56	(9,182.56)
Travel- ERAPPA Annual Meeting	-	-	-
Travel - APPA Annual Meeting	-	-	-
Printing & Postage	1,500.00	67.62	1,432.38
Marketing	500.00	-	500.00
Insurance	4,100.00	3,918.66	181.34
Incorporation	25.00	25.00	-
Board Meet - Winter (Mid-Year) Meet	35,000.00	17,279.76	17,720.24
Board Meet - Summer	14,500.00	21,159.69	(6,659.69)
Board Meet - Annual	-	-	-
Bank Fees	150.00	5.00	145.00
Accounting Fees	18,000.00	13,522.50	4,477.50
Software Fees	600.00	590.00	10.00
Dues Collection Fees	17,500.00	11,392.38	6,107.62
Annual Meeting Expense	-	-	-
Commissions & Service Fees	-	-	-
Ad-Hoc Meetings - Conference Calls	500.00	-	500.00
sub-total	<u>92,875.00</u>	<u>77,643.17</u>	<u>15,231.83</u>
VP Technology-Communications			
Web Review & Development	10,000.00	3,745.71	6,254.29
Dropbox -Professional	2,500.00	2,237.32	262.68
Winter (Mid-Year) Meet - T&C Comm.	9,900.00	6,219.50	3,680.50
ERAPPA Communication	1,000.00	925.27	74.73
sub-total	<u>23,400.00</u>	<u>13,127.80</u>	<u>10,272.20</u>
Awards / Scholarships			
Scholarships & Expenses	44,500.00	60,685.00	(16,185.00)
Credentialing Scholarship	45,000.00	13,200.00	31,800.00
Ambassador Scholarship Top-Up	-	-	-
Student Ambassador Scholarship	-	-	-
Awards	3,000.00	82.55	2,917.45
sub-total	<u>92,500.00</u>	<u>73,967.55</u>	<u>18,532.45</u>
Professional Development			
Misc. Prof Develop. Expenses	1,100.00	1,110.00	(10.00)
Partners-in-Education Support (PIE)	8,000.00	4,958.65	3,041.35
Winter (Mid-Year) Meet - PD Comm.	8,250.00	7,451.79	798.21
PD Webinar Expense	-	-	-
Annual Meeting Grant	10,000.00	10,000.00	-
Toolkit Sponsorship at Annual Meeting	-	-	-
sub-total	<u>27,350.00</u>	<u>23,520.44</u>	<u>3,829.56</u>
Expenses Total	<u>335,575.00</u>	<u>271,259.61</u>	<u>64,315.39</u>
NET	<u>(186,050.10)</u>	<u>(125,128.68)</u>	<u>60,921.42</u>

ERAPPA Proposed Budget Treasurer's Report
July 1, 2022 – June 30, 2023

For the fiscal year 2022-23 the ERAPPA Board is proposing an operating budget that will result in a year-end operating loss of \$121,216. This loss is due primarily to reduced annual meeting revenue in 2022 and to higher travel costs for the mid-year meeting occurring in Saint John, New Brunswick Canada.

The budgeted revenue for membership dues represents the three-year average. As ERAPPA dues are a percentage of the APPA dues, any increase or decrease in APPA dues will result in an increase or decrease in ERAPPA dues. However, for the tenth 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, hosting the first annual meeting since 2019, revenue from the annual meeting is projected to be lower than past years. While this may result in less revenue for the organization, 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 educational opportunities for our members. In 2022-23 ERAPPA will be awarding:

Eight educational scholarships with a total value of \$34,000, for virtual and in-person learning opportunities.

CEFP 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 2022, a grant of \$10,000 will be available to host committees, replacing previously provided seed money, which will not need to be repaid. The board is continuing its support of educational opportunities for the chapters by budgeting \$8,000 in Partners in Education grants to cover speaker expenses at chapter events.

This budget once again is forecasting a planned deficit like the 2021-22 budget. While we anticipate a less significant financial loss this year as compared to what was planned for last 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 2022 summer meeting, the Board exhaustively reviewed the 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 no, or reduced annual meeting revenues for this year and the past two years that sustain the organization, the Board is carefully managing and updating this 10-year budget cycle projection for you our members, safeguarding the financial stability of ERAPPA.

ERAPPA BUDGET
July 2022 - June 2023

2022

REVENUE

Interest - Savings Account	400
Membership Dues	136,704
Annual Meeting Proceeds	54,800
Refund - ERAPPA Prog Support	-

Reflects reduced interest rates which have fallen due to the pandemic
Gross Dues: 95% of 3 year avg
2022 Annual Meeting Proceeds projected to be less due to economy
Repayments are recorded against receivables and not actual revenue

Total Revenue 191,904

Operating Expense

Annual Meetings

Expenses and Travel	7,800
Host Committee Visits	2,500
Failed Meeting Expense	-
sub-total	10,300

6 committee members at \$1,300 (Canada); 3 yr avg \$789 each. No travel in two of those years.
previous 3 year average \$808. Includes 2 years of no visits. Canadian travel considered.
Not expected in 2022-23

Chapter Affairs

Travel - Chapter Meetings	-
Chapter Affairs Comm Mtg	11,700
sub-total	11,700

eliminated in 15-16, contact is made at MYM
9 committee members at \$1,300; 3 yr avg \$526 each.

Membership

Membership Comm Mtg	13,000
ERAPPA Membership Initiative	4,600
sub-total	17,600

10 committee members @ \$1300
Last 3 yr avg is \$3,049, Board approved \$4,600 in July 2019 conference call

Administrative/Governance

Miscellaneous expense	1,000
Travel - ERAPPA Annual Mtg	5,000
Travel - APPA Annual Meeting	-
ERAPPA meeting expense	-
Printing & Postage	500
Marketing	15,000
Insurance	4,000
Incorporation	25
Board Meeting - Winter	40,000
Board Meeting - Summer	15,000
Board Meeting - Annual	16,000
Bank Fees	-
Accounting Fees	18,500
Software Fees	600
Dues collection (APPA)	13,670
Annual Meeting Expense	2,000
Commission & Service Fees (Travel)	-
Tele-Conference	-
sub-total	131,295

3 yr avg \$474
3 year avg is \$885. No meeting in 2 of 3 years. Expecting institutional budget issues may increase this line item.
3 yr avg \$1,682 (3 attendees @ \$2,000). No meeting to attend in 2020 and 2021. Still valid line item?
has not been historically used; eliminated
3 yr avg \$460;
significant variance yr to yr; no expense last 3 years. May be needed for 2022 AM.
3 yr avg \$3,742.
\$25 fee plus \$5 processing. No processing fee online.
3 yr avg \$7,585. (2020 & 2021 MYM canceled which is reflected in 3 yr average). Next MYM in Canada.
3 yr avg \$4,574 (2020&2021 summer meeting held fully or partially online. Expecting fully in person in June 23)
3 yr avg \$5,642; No meeting to attend in 2020&21.
No longer needed - \$0.00 budget
3 yr avg \$18,437
QuickBooks went from \$40/mth to \$50/mth in 21/22
10% of dues; 3 year avg \$14,390. Estimated at 10% of planned 22-23 dues.
Rarely used
Eliminated in 2018-19. Fees now included in costs for each meeting/committee.
Eliminated in fall 2020 FY. Using MS Teams instead.

Technology & Communication

Web Review & Development	7,500
Microsoft Office 365	2,300
Technology & Comm Mtg	13,000
ERAPPA Communication	1,000
sub-total	23,800

3 yr avg \$13,415 includes one year of web site upgrade expense that will not be incurred in 22-23.
\$205/person for 11 people. Switch from Dropbox to MS Office 365
10 members @ \$1,300 per person. 3 year average \$331 per person.
3 yr avg \$925

Awards/Scholarships

Scholarships - Leadership Acad.	34,000
Credentialing Scholarship	45,000
Ambassador Scholarship Top-up	-
Student Ambassador scholarship	-
Awards	6,000
sub-total	85,000

Assumes 8 scholarships @ \$4,000, plus \$2,000 buffer.
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.
New in 14-15 covering gap in Sponsor & Actual cost, not used last 3 yrs
eliminated; conference sponsorship opportunity
3 yr avg \$993. Increase amount to cover possible additional awards since no AM in 2020&2021

Professional Development

Misc P.D. Program Expenses	1,125
Major Update of PD Materials	-
Partners in Education Support	8,000
Professional Development Mtg	14,300
ERAPPA Program Support	-
Webinars	-
Toolkit sponsorship at Annual Meeting	-
ERAPPA A/M Grant	10,000
sub-total	33,425

\$1,110 in 2021-22 for AIA registration (annual registration)
request when needed
Ongoing support for speakers at Chapter meetings; 3 yr avg \$3,300
11 @ \$1,300; 3 yr avg \$218 each
APPA cost now; was \$1,500 each; 4 per year
Board voted in 17/18 to eliminate starting with 2020 annual meeting

Total Operating Expense 313,120

3 year average \$272,963

Net (121,216)

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, and the Pacesetter award. The committee's recommendations are then sent to the APPA Board of Directors for final approval.

Unfortunately, annual Award submissions continue to drop. Award submissions dropped from a total of 50 submissions in 2020, to 20 submissions in 2021, to 19 submissions in 2022.

Awards Review Activity:

	2021	2022
APPA Fellow	2	1*
Meritorious Service	1	1
Pacesetter	3	5
Effective & Innovative Practices (E&I)	11	10
Sustainability	3	2

*APPA Board took over responsibility for selecting the APPA Fellow awards

The committee met virtually on March 15, 2022, to finalize award recommendations for 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.

2022

Portland State University (PCAPPA)

Wayne State University (MAPPA)

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.

2022

Florida State University (SRAPPA)
 The Julliard School (ERAPPA)
 University of Alabama (SRAPPA)
 University of California, San Francisco (PCAPPA)
 University of Virginia (SRAPPA)

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.

2022

David Handwork, CEFP, Arkansas State University (CAPPA)

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.

2022

Sheri Vucci, CEFP, Smithsonian Institution (ERAPPA)

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.

2022

Glen Haubold, New Mexico State University (emeritus) (RMA)

In an effort to re-ignite interest in the awards, the committee has met twice this summer to review the existing criteria and how winners are selected. Members have been soliciting feedback from their respective regions and are working to have recommendations prepared for consideration by the APPA Board for the 2023 award cycle.

Communications Strategies Committee

Billy Gagnon

ABM



The Communications Strategy Team was established in February 2022 and had their first call in early March. There are 9 members to date, not including APPA staff facilitators (Anita and Steve).

Talking points:

Social Media Management

1. Where do people get their APPA info (APPA web, Region web, Facebook?)
2. When do they want it (when are emails opened, when are they best obtained)?
3. What platforms are also used or should be considered?
4. How do we currently receive content and what do we think of it?
5. Formatting. Too wordy? What catches the eye? Embedded videos from an APPA member regarding lengthy updates?

APPA Survey

We collected data from all team members and decided to draft and publish a survey to all APPA members via email in August 2022. The survey results received September 2022 are attached in initial email attachment, but highlights are:

1. 50% of responses preferred to receive APPA information via EMAIL and Facilities Manager or digital magazine coming in second place (16%).
2. Job Express and FM Magazine are most popular on the APPA website.
3. Respondents are most interested in APPA communications regarding PD, Upcoming Events and Webinars.
4. Most people prefer weekly communications (53%), with Daily (37%) coming in 2nd place.

With these responses just being received, the CS team will review and implement changes to enhance communications. Several options are already being discussed such as:

1. APPA Membership Survey
2. Proposed Bi-Weekly Newsletter (email).

DEI Taskforce

Andy Feick

Swarthmore College



Background

In September 2021, APPA's Executive Committee formed a Task Force to focus on diversity, equity, and inclusion (DEI). With this commitment, the 2021-2022 APPA Board of Directors identified one of its high priority initiatives to advance diversity, equity, and inclusion principles and practices within APPA. This action reflects APPA's commitment to *prepare for every future* by formalizing its past and current practices around equity and inclusiveness for the association. Moreover, through this action APPA demonstrates a sustained and comprehensive commitment to establish an organizational climate that is just and inclusive – regardless of individual differences, beliefs, or identities.

In early 2022, the Task Force has delivered, and the APPA Board has formally approved, the reports' recommendation to adopt a formal DEI Statement of Commitment for APPA as well as DEI definition of terms. In addition, the Task Force developed recommendations across five strategic areas:

1. Volunteer Recruitment, Retention, and Leadership Activities
2. Professional Staff and Board
3. Policies, Procedures and Award Criteria
4. Member-facing Offerings and Brand Promise, Identity, and Messaging
5. Training, Assessment, and Continuous Improvement (universally applies to all strategies and associated actions)

For each strategic area, the Task Force identified specific actions and tasks that will lead to meaningful gains in becoming a more diverse and equitable association while simultaneously ensuring sustained progress in creating an organizational climate that is inclusive and welcoming to all.

The work of the APPA DEI Task Force sends an important signal to our membership that APPA leadership recognizes the importance of intentionally integrating DEI into all aspects of the association. Indeed, this initiative is fundamental to APPA's continued success as the professional association of choice for educational facilities professionals. Together we can enhance that sense of belonging and welcoming that is so critical to creating a true culture of inclusion.

APPA Member & Community Engagement Committee

Glen Mathieu

University of Connecticut



Report to the Membership – Member and Community Engagement Liaison to ERAPPA

Sustaining and engaging membership at the chapter, regional, and national levels during the 21-22 year has been both challenging and refreshing. As the COVID 19 Pandemic subsided, it appeared that every region had retrenchments. Re-engaging was difficult. Despite limitations related to retirements, budget reductions, and professional development travel, the APPA Member and Community Engagement managed to maintain good spirits and through collective efforts positively affected the professional APPA and regional membership renewals.

2021 – 22 has seen an inordinate number of retirements. Not only does this create a bit of brain drain, but it also creates voids in membership renewals. Data provided by APPA revealed that reconnecting with educational institution representatives to renew annual dues was a huge challenge. The committee members, joined by the APPA staff, consistently restated the APPA value, found the “right” person at the institution, and the result of dues renewal was rewarding.

Without a doubt, nearly all colleges reevaluated its monetary investment in professional development commitments while emerging from the financial hardships. Many institutions suffered lower student enrollment and therefore endangered operating budgets. The APPA selling point: Professional Development. Webinars are bountiful and with low impact webinars, dues renewals received a boost as institutions realized the value of educating many by renewing their national and regional dues.

APPA found many institutions revised their policies regarding travel. APPA responded with a new format for educating its members. The APPA Annual Meeting morphed into Virtual Business meetings. Very specific topics emerged for the membership. At the root of APPA’s professional development is membership. Stressing membership as the key to attending the non-travel related programs was another key to gaining new members while maintaining existing institutions.

In the end, membership has its roots in the chapters and the regions. During Member and Community Engagement Committee meetings, new faces provided new thoughts. Regional representatives provided perspective on how their chapters were “shaking off the cobwebs” and spinning into new adventures. Many regionals have even taken the extra step to reach out to their business and Institutional partners to remind them of renewing their membership.

What is refreshing? The journey through the COVID 19 Pandemic has given the Member and Community Engagement Committee the opportunity to rethink our vision, reshape our objectives and recruit new people to help provide a different perspective to involving our newest members and hopefully, retaining many of our first-time attendees to help us in the coming years.

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	David MacDonald	Dalhousie University
VP Professional Development	Kris Kierstead	New Brunswick Community College
VP Communications / Secretary	Tom Gilmore	University of New Brunswick

2. Chapter Governance

Late in 2021, AAPPA was notified that VP Membership / Treasurer, Marina Clayton-Therault, was resigning from her position as she was making a career change to a field outside of Higher Education. The membership was polled for someone to step into this role on an interim basis to get us to our formal elections. David MacDonald, from Dalhousie University was appointed to this position on an interim basis. Following our AAPPA By-laws, the positions of VP Membership / Treasurer and VP Communications / Secretary were up for renewal this year. In June of 2022, our chapter returned to an in-person Spring Business Meeting with a virtual option for any members who could not attend in person. Tom Gilmore was re-elected for a second term as VP Communications / Secretary. David MacDonald was elected in the position of VP Membership / Treasurer.

3. Chapter Events

Our chapter was able to hold its first in-person event this past June with our Spring Business Meeting in Saint John NB, hosted by NBCC. This meeting was well represented by many of our member institutions both in person as well as virtually for those unable to attend in person. It was good to reconnect with many of our AAPPA colleagues.

4. Chapter Events Planned

At our Spring Business meeting, the membership was supportive of resuming our Fall Conference. There is still some uncertainty and risk with what the future may hold for, but all felt that this is a good step forward. Plans are underway to resume our Fall events, scheduled for Halifax, NS for November 3 - 4, 2022. 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 and Hilton Saint John. The various sub-committees of the host committee have resumed their meetings and planning activities from where we left off when the 2020 conference was cancelled due to the pandemic.

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. AAPPA will not be pursuing APPA Educational programming as normally part of our annual Fall Conference.

7. Major Initiatives

None at this time.

8. Major Areas of Concern

None at this time.

Delaware Valley Chapter DVAPPA

Andy Feick, Chapter President
Swarthmore College



1. Chapter Leadership

President	Andy Feick (Outgoing)	Swarthmore College
	Brett Fulton (incoming)	Muhlenberg College
Vice President	Jeff Brown	Delaware Valley University
Secretary	Ryane Hoban	Villanova University
Treasurer	Amber Donato	Moravian College
Professional Development	Chris Andreozzi	Thomas Jefferson University
Membership	Tyrone Dunston	Swarthmore College
Technology & Communications	Brett Fulton	Muhlenberg College
Webmaster	Brett Fulton	Muhlenberg College
Business Partner Liaison	Meaghan Finney	Voith and Mactavish Architects

2. Chapter Governance

A main focus of the chapter has been to rebuild the Board from several board member resignations related to job changes. The most recent resignation was by John Camusi as Member at-large for Professional Development. DVAPPA remains grateful for John's service and John's departure cleared the way for one of our young professionals, Chris Andreozzi, to move from Secretary to the key role of Professional Development. Chris's move provided an opportunity for another young professional, Ryane Hoban, a project manager for Villanova University, to join the DVAPPA Board as Secretary. We are very excited to have two very talented young professionals on the DVAPPA Board. Both were formally elected to the DVAPPA Board in June 2022.

DVAPPA was also thrilled that our chapter Business Partner Liaison, Leslie Whitby, was selected by ERAPPA to serve on the ERAPPA Board. Leslie's departure provided an opportunity for another stellar business partner, Meaghan Finney, to join the DVAPPA Board.

Also related to Board Governance is Board member terms of office. Though we did our best to adhere to the chapter by-laws, COVID caused some terms to extend longer than is permitted in the by-laws and the recent elections are a step toward restoring the Board member tenure to comply with the chapter by-laws.

3. Chapter Events

Starting from DVAPPA's first in-person event since February 2020, the chapter hosted a business meeting, professional development and networking happy hour at Villanova University on June 8, 2022. The professional development was provided by Cathy Davidson, author of *The New Education: How to Revolutionize the University to Prepare Students for a World in Flux*. Cathy had been the selected plenary speaker for the 2021 ERAPPA Conference in Valley Forge before the conference was

shifted to 2024. The meeting also included a tour of Villanova University's new Performing Arts Center.

All other chapter meetings were virtual because of COVID surges and included:

June 9, 2021, presentation from a Stantec planner about Covid return to workplace planning

October 6, 2021, presentation by Lander Medlin who discussed APPA's strategic plan

March 16, 2022, presentation about FM leadership by Mitch Clayton, SVP from Thomas Jefferson University

The DVAPPA Board also held our annual Board Holiday dinner on December 8, 2021, at Founding Farmers Restaurant and we enjoyed good cheer and each other's good company.

4. Chapter Events Planned

Planning for the delayed 2021 ERAPPA Conference (now 2024) will pick back up. No dates have been set at this time for the fall and winter and spring DVAPPA Chapter meetings.

5. Membership

Institutional Membership:

The Chapter's current institutional membership is 81 total members.

Business Partners Membership:

The Chapter's business partner membership is currently at 67.

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.

7. Major Initiatives

While the pre-Covid goals of the chapter leadership remain relevant, the bulk of the chapter focus has been on keeping the Board stable and supported and keeping the chapter membership engaged throughout the Covid pandemic.

Despite the Covid challenges the chapter advanced the goal of engaging young professionals by bringing two young FM professionals onto the DVAPPA Board.

Focuses for the DVAPPA Chapter leadership remain:

- Consideration and vetting of a new chapter website that provides greater functionality and engagement opportunity for the chapter membership.
- Selecting a new Member at-large for Technology because of Brett Fulton's rise to Chapter President.
- Selecting a new Member at-large for Membership because of Tyrone Dunston's finishing his board term.

- Increasing institutional member participation at chapter events

With a new chapter president, there will be other chapter priorities.

8. ERAPPA 2024

Yvonne Shaw from BTI remains as the ERAPPA 2024 conference planner and we have selected the Valley Forge Casino Hotel as our venue. Soon it will be time for conference co-chairs Leslie K Whitby and Amber Donato to reactivate the host committee.

9. Major Areas of Concern

Institutional member engagement remains the biggest challenge. Despite a significant personal outreach by DVAPPA board members to member institutions, institutional participation at the most recent DVAPPA event remained low. Also, given the many Covid-related job changes and retirements, it is evident that our chapter membership list is woefully outdated and inaccurate. A significant effort to update it and also to find a means of keeping it updated is necessary. Also, the chapter Board members are all very busy and there is insufficient time for Board members to do personal outreach.

Keystone Chapter KAPPA

Scott Albert, Chapter President
Slippery Rock University



1. Chapter Leadership

President	Scott Albert	Slippery Rock University
1st Vice President	Randy Geering	Penn State Behrend
2 nd Vice President	Mark Bodenschatz	Penn State Facilities Engineering Institute
Past President	George Papuga	Carnegie Mellon University
Treasurer	Shannon Giannoutsos	Carnegie Mellon University
Secretary	Shannon Wetzol	Carnegie Mellon University
Director	Kevin Bevenour	Penn State York
Director	Brian Richards	Community College of Allegheny County
Director	Greg Black	Millersville University
Director T&C	Erik Cagle	Penn State University Park
Business Partner	Cristina Barnes	Stahl Sheaffer Engineering

ERAPPA Committee Representatives

Chapter Development	Scott Albert	Slippery Rock University
Prof. Development	Greg Black	Millersville University
Prof. Development	Cristina Barnes	Stahl Sheaffer Engineering
Member & Comm. Eng. Technology	Brian Richards	Community College of Allegheny County
	Erik Cagle	Penn State University Park

2. Chapter Governance

KAPPA had three open positions to fill this year. Second Vice President, Treasurer, and a Director. Greg Black and Shannon Giannoutsos agreed to run for re-election and Mark Bodenschatz accepted the nomination to run for Second Vice President. All three candidates were unanimously elected.

3. Chapter Events

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

KAPPA decided to return to face-to-face meetings this year. The Spring 2022 meeting was hosted by the Community College of Allegheny County at the DoubleTree in Cranberry, Pennsylvania on April 20th and 21st. It was anticipated that attendance would be down for this meeting, as a number of KAPPA members were not allowed to travel due to COVID restrictions

at their respective institutions. There were 130 attendees, which was 46% lower than our last face-to-face meeting. The keynote speaker was Alyson VanHooser who presented – “*Own Your Success – Using Authentic Connections to Uncover Your Next Move.*” Allison was also kind enough to donate several copies of her book which were raffled off to the attendees. Based on member suggestions, we incorporated some round table discussions on current hot topics such as staffing challenges. Feedback from the conference attendees was very positive.

4. Chapter Events Planned 2022-2023

The Fall 2022 meeting will be held October 12-13, 2022, at the Wyndham in Gettysburg. The Spring 2023 meeting will be held at the Omni in Bedford Springs, and the Fall 2023 meeting has been tentatively scheduled for Lancaster.

5. Membership

While attendance was down at our first face-to-face meeting, participation in the online meetings held during COVID were well attended. We anticipate that by the Spring 2023 meeting, attendance will have returned to historical levels, as Bedford Springs is a popular venue to our members. Director Richards has also been reaching out to institutional members that haven't participated recently and is encouraging them to re-engage. Our business partner attendance/support continues to be very strong.

6. Scholarships

KAPPA offers the Norman H. Bedell Annual Scholarship (2) towards the many professional development opportunities that APPA offers and scholarships (2) to attend the ERAPPA Annual Meeting. Applications for scholarships are available on our web site. Winners will be recognized at our fall meeting this year.

7. Major Initiatives

Membership: The chapter continues to promote institutional membership growth as well as further expand our business partner relationships.

Educational Needs: The Chapter continues to provide informative speakers to our membership and diligently searches for relevant keynote speakers for our sessions.

8. Areas of Concern

Our chapter strives to provide affordable meetings that offer exceptional value for networking with business partners and institutional members. The chapter continues to search for new and creative programs to engage our members and develop new professional relationships. It is imperative that we keep our meetings affordable for our members, given the budget challenges our members are facing due to declining enrollments.

9. Chapter Finances

While we did incur a loss at our Spring conference, which was to be expected, the chapter's financial position continues to remain strong. We anticipate that based on our 10-year budget plan, which was developed in 2019, that we are in good shape financially through at least 2030.

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	Vacant	
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 & Comm.	Jason Sawyer	Smithsonian Institution
Professional Development	Mary Grube	St. Mary's College of Maryland

ERAPPA Committee Representatives

Chapter Development	Kelly Geishauser	The Catholic University of America
Professional Development	Quajalyn Amos	University of Maryland College Park
Member & Comm. Eng.	Jimmy Burcham	University of Maryland College Park
Technology & Comm.	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. Call for vote will go out this month.

3. Chapter Events December August 2021 – July 2022

Board of Director Meetings & Conference Calls

- Planning Meetings:
 - March 9 & 10, 2022 - 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 2021 – July 2022)

- Monthly – noon on the first Monday of each month

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

Spring 2022 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. MD/DC APPA participated in the show with a free booth March 29, 30 and 31

2022 Annual Two-Day Chapter Educational Program. The Chapter held its' two-day program June 16 and 17, at Rocky Gap this year and expanded it to include a Supervisors Toolkit session which started one day early. The attendance was more than we expected, this being our first in person program since the pandemic, and we had a total of 86 attendees. In addition to the supervisors toolkit session, we did a session on Speed of Trust over the two days.

4. Chapter Events Planned 2021 - 2022

Fall Educational Program: The Chapter is tentatively planning an in-person meeting in October 2022.

Spring 2022 Educational Program: no plans to date

2023 Annual Two-Day Educational Program. June 15 & 16, 2023

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

None at this time.

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 Jersey Chapter NJAPPA

Earl Farrell, Chapter President
Montclair State University



1. Chapter Leadership

President	Earl Farrell	Montclair State University
President-Elect	Vacant	
Past (Past) President	Todd Miller	New Jersey Institute of Technology
Director of Membership	Joshua Johnson	Mercer County Community College
Director of Technology	Lavone Broxton	Montclair State University
Director of Professional Development	Vacant	
Treasurer	Todd Miller	New Jersey Institute of Technology
Secretary	Amy Baker	New Jersey Institute of Technology
Director at Large	Stephanie McCormick	Drew University
Director at Large	Walter Eddy	Rider University
Business Partners	Christine Messina	All Risk Inc.
Business Partners	David Cole	Colliers Engineering
Business Partners	Darren Ault	Patcraft

ERAPPA Committee Representatives

Chapter Development	Earl Farrell	Montclair State University
Professional Development	Vacant	
Member & Comm. Eng. Technology & Communications	Joshua Johnson	Mercer County Community College
Vice President for Business Partners	Lavone Broxton	Montclair State University
	Vacant	

2. Chapter Governance

No changes since the last report.

3. Chapter Events 2021-2022

Board of Director Meetings & Conference Calls

- Planning Meetings:
- October 28, 2021 – Fall General Membership Meeting @ Rider University
- Spring Conference/Educational Program @ Seaview Hotel (Canceled due to COVID)
- Spring General Membership Meeting, June 9, 2022 @ Montclair State University

- Fall General Membership Meeting, October 20, 2022 @ Mercer County Community College
- Conference Calls
 - June 24, 2021
 - July 2021 (Canceled)
 - August 12, 2021
 - September 9, 2021
 - September 30, 2021
 - November 18, 2021
 - December 16, 2021
 - January 27, 2022
 - February 18, 2022
 - March 17, 2022
 - April 14, 2022
 - May 18 2022 (@ Montclair State University)
 - June 9, 2022 (@ Montclair State University)

Fall 2021 General Membership Program: October 28, 2021, the Fall General Membership Meeting was held at Rider University. The meeting was well attended by approximately 75 participants. This was our first in-person meeting since the beginning of COVID. Topics included:

- **“Pulling Back the Curtain – A Case Study in Collaboration and Transparency.”** Presented by, Robert Prodoehl, Exec. Dir. of Operations & Administration, Rutgers University, RWJ Medical School & Jeffrey Venezia, AIA, President & CEO, DI Group Architecture, LLC., Jaime Masler Beach, AIA NCARB, Senior Project Manager, DI Group Architecture, LLC.
- **“Creating a Sustainable Energy Master Plan for Higher Education Facilities & Campuses”** Presented by Thomas Brys, Energy Specialist, Colliers Engineering & Design

Spring 2022 Conference/Educational Program: Canceled due to the rise in COVID cases in New Jersey.

Spring 2022 General Membership Program. June 9, 2022, the Spring General Membership meeting will be held at Montclair State University. The meeting was well attended by approximately 110 participants. Topics included:

- **“Marketing and positioning your Facilities Organization for building successful customer relationships”** (PRESENTED BY: Melissa Bergeron, Assistant Director Operational Services, University of Massachusetts, SNEAPPA Chapter) & Erik Cagle, Manager, Custodial Operations, Penn State, KAPPA Chapter)
- **“Deferred Maintenance Assessment: A paperweight or an executable plan? Swarthmore College’s success story.”** (PRESENTED BY: Andrew Feick, Assoc. VP Sustainable Facilities Operations & Capital Planning, Swarthmore College, DVAPPA Chapter)

Chapter elections were postponed until our 2022 Fall General Membership Meeting. Our current open positions are as follows:

- President Elect
- Professional Development
- Director at Large
- Treasurer

Supervisor's Toolkit. None were planned for 2021-2022.

4. Chapter Events Planned 2021-2022

Fall Educational Program: Rider University, scheduled for October 28, 2021.

Spring Educational Program: Canceled – Spring Meeting @ Seaview Resort

Spring General Membership Meeting: Montclair State University - June 9, 2022

5. Upcoming ERAPPA Conference

The NJAPPA Board will be attending the 2022 ERAPPA annual conference in Verona, NY.

6. Membership

Our Institutional Membership numbers are stable. We continue to work at recruiting new members including community colleges. We are focusing on trying to encourage more of our institutional members to join the NJAPPA Board.

Our Business Partner Membership is strong and extremely supportive of NJAPPA and our mission. We are continuously working to get both EDU members and BP members to pay their dues.

7. Scholarships

2022: (4) NJAPPA Scholarships will be awarded for the annual ERAPPA conference.

8. Awards and Recognition

At our Fall General Membership Meeting we recognized Todd Miller, Andrew Christ and Patricia Smith for their successful past roles in NJAPPA. Todd's was for his role as outgoing President, and Andrew for his role as outgoing Trustee, and Patty Smith for her role as Director of Membership/VP of Membership-ERAPPA.

9. Major Initiatives

Membership. The Chapter continues to cultivate its membership by establishing personal contacts. We welcomed many 1st time attendees at our Fall & Spring General Membership Meetings this year and we hope to encourage those attendees to become members.

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

Northern New England Chapter NNECERAPPA

Jessica M. Picard, Chapter President
The University of Southern Maine, ME



1. Chapter Leadership

Jessica Picard	University of Southern Maine	President
Tom Baker	Norwich University	Vice President
Marc Guertin	Southern New Hampshire	Secretary/Treasurer
Vacant		New Hampshire State Director
Doug Cosentino	Colby College	Maine State Director
Karen Lemire	University of Vermont	Vermont State Director
Paul Campo	University of Vermont	Ex-Officio/Past President
<u>Committee Chairs:</u>		
Tandra Boilard	Phillips Exeter Academy	Membership Chair
Doug Plummer	Kimball Union Academy	Outreach Coordinator
Tim Pratt	Bates College	Professional Development Chair
Vacant		Business Partner Chair
Billy Gagnon	ABM	Technology Chair
Hank Dozier	Retired	Emeriti Chair
Vacant		Business Partner Liaison

ERAPPA Committee Representatives:

Chapter Development	Jessica Picard
Professional Development	Tim Pratt
Membership & Community Engagement	Tandra Boilard
Technology & Communications	Billy Gagnon

2. Chapter Governance

No changes.

3. Chapter Events

Board Meetings & Conference Calls

- In-Person Conference June 27-28, 2022 in Manchester, NH
- APPA Supervisor Toolkit sponsored as part of conference June 26-28 in Manchester, NH
- In-Person on Board Meeting March 17-18, 2022
- Conference Calls: Calls are held monthly.

4. Chapter Events Planned 2021 - 2022

Conference tentatively scheduled for March 9-10, 2023 at St. Paul's School (NH).

5. Membership

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

6. Scholarships

Up to \$30,000 in scholarships may be given out to APPA, ERAPPA and NECERAPPA events.

7. Major Initiatives

Membership: The Chapter continues to develop membership by establishing personal contacts through Business Partners and institutional members

Educational Needs: The Chapter ensures cutting edge sessions and strives to provide AIA and other professional CEUs for the sessions. We are attempting to promote 1 to 2 educational drive-ins per year with our business partners.

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

8. Major Areas of Concern

Events Membership

- Ability to travel
- Training budgets
- Ability to hold in person events
- Overall institutional fiscal viability

Business partners

- Advertising budgets
- With long-term volunteers exiting the organization we need to become more diligent about outreach for volunteers and new members

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 Germain	Cornell University
Membership	Rex Giardine	SUNY ESF
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 2021 - 2022

All events have been held virtually for 2021

Summer 2021 June 16-17, online and well attended.

Had an onsite meeting in October at Turning Stone with a small group from ERAPPA Board.

Winter Conference February 16, 2022 online.

5. Membership

Are hoping for assistance from our Business Partners. Idea is to gaining access to their client lists due to unpublished information on key players at the campus level.

6. Scholarships

Talking about expanding scholarships into the Business Partners as another value added avenue for them.

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. We will be in full swing following ERAPPA 2022, as NYAPPA is hosting and focused on the planning of conference.

8. Business Partner Relationship

- We have had a very engaged third 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. We plan to onboard the 2nd Business Partner at September board meeting.

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. We were looking at a hybrid format and realizing this can actually double expenses due to the high cost of the rentals of technology necessary to provide virtual attendance
- 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 NYAPPA financial position remained strong at year-ended 2021. 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.

However, We do remain mindful of our investments as we move toward hosting ERAPPA 2022. It is unknown the budgeting available for travel and continuing education provided by individual campuses for their facilities managers.

ONTARIO CHAPTER OAPPA

John Witjes, Chapter President
Queen's University



1. Chapter Leadership

President	John Witjes	Queen's University
Past President	Hugh Briggs	Lakehead University
Vice-President	Gordon Robins	University of Toronto
Secretary	Alp Amasya	Ryerson University
Treasurer	Ron Ogata	York University
Energy Committee Chair	Nathan Splinter	Queen's University
Professional Development	Marc-Antoine Joli	University of Ottawa

ERAPPA Committee Representatives

ERAPPA Board	Hugh Briggs	Lakehead University
Technology & Communications	Gordon Robins	University of Toronto
Chapter Development	John Witjes	Queen's University
Professional Development	Stepanka Elias	University of Waterloo
Member & Comm. Eng.	vacant	

2. Chapter Governance

In May of 2021, elections were held for the President, Vice-President and Secretary positions. John Witjes Queen's University, Gordon Robins University of Toronto and Alp Amasya Ryerson University were unanimously endorsed by OAPPA members to the positions. Hugh Briggs was congratulated on his three terms as President and agreed to continue as Past President. Ron Ogata York University will continue as Treasurer.

3. Chapter Events

- a. Directors
 - i. October 1, 2020 – Microsoft Teams meeting
 - ii. February 3, 2021 – ZOOM meeting
 - iii. March 25, 2021 – ZOOM meeting
 - iv. May 20, 2021 – ZOOM meeting
 - v. June 24, 2021 – ZOOM meeting
 - vi. August 26, 2021 – ZOOM meeting
 - vii. September 29, 2021 – ZOOM meeting
 - viii. December 9, 2021 – Quarterly Business Meeting ZOOM meeting
 - ix. January 20, 2022 – ZOOM meeting
 - x. February 24, 2022 – ZOOM meeting

- xi. March 22, 2022 – Quarterly Business Meeting ZOOM meeting
- xii. April 27, 2022 – ZOOM meeting
- xiii. June 2, 2022 – Annual General Meeting - ZOOM meeting
- xiv. Energy Committee
- xv. September 18, 2019 – Ryerson University
- xvi. December 4, 2019 – Ryerson University
- xvii. April 1, 2020 – ZOOM Meeting
- b. Energy Committee
 - i. October 21, 2020 – Virtual Meeting
 - ii. March 24, 2021 – Virtual Meeting
 - iii. June 26, 2021 – Virtual Meeting
 - iv. September 30, 2021 – Virtual Meeting
 - v. January 12, 2022 – Virtual Meeting
 - vi. April 19, 2022 – Virtual Meeting

5. Membership

- a. Membership is stable and the participation rate is very good. Meeting frequencies have increased beyond the quarterly business meetings to include monthly one-hour check-ins at the request of the membership.
- b. OCFMA (colleges) and OAPPA (universities) 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. is stable and the participation rate is very good.

6. Scholarships/Awards and Recognition

A nomination for Chapter Champion was submitted for selection in 2022

7. Major Initiatives

- a. COVID 19
 - i. Preparation for the fall academic year and COVID related challenges throughout the year dominated meeting agendas
 - ii. Meeting frequency increased to monthly at the request of membership heading into the academic year
 - iii. A survey of COVID-19 2021-22 academic year preparedness was circulated and discussed
 - iv. Ventilation and cleaning standards primary topics of discussion and concern.
- b. Deferred Maintenance Facility Condition Assessment Program (FCAP)
 - i. Selected new vendor for assessments using OECM <https://oecm.ca>
 - ii. Worked with OCFMA to standardize our datatype
 - iii. Provide Ontario Government MCU with updated data on FCAP
 - iv. FCAP committee active to revitalize our data
 - v. Membership actively working with new vendor

- vi. RFP for new database vendor in progress
- c. Government Reporting
 - i. Energy reporting to various government ministries
 - ii. Asset inventory of all buildings including number 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
- e. Education
 - i. Professional Development team members leading efforts to reinvest chapter money into education of membership including efforts to revise Supervisor's Toolkit and monthly lunch and learns. Two Supervisor's Toolkit sessions were held in early 2022 for OAPPA membership and the sessions were very well received

ONTARIO COLLEGE FACILITIES MANAGEMENT ASSOCIATION OCFMA

Tim Schill, Chapter President
Conestoga College



1. The Leadership

Chair	Tim Schill	Conestoga College
Chair Elect	Vacant	
Vice Chair	Vacant	
Past Chair	Vacant	
Secretary	Janneke Nicholls	Cambrian College
Treasurer	Brent Thomas	Lambton College
Energy	Paul Cochrane	Lambton College

ERAPPA Committee Representatives

Professional Development	Lan Chi Nguyen Weekes	Le Cite College
T&C Committee	Rich McEvoy	Fanshaw College
Member & Comm. Eng.	Kathryn Brubacher	Conestoga College

2. Chapter Governance

We are in the midst of rewriting our chapter terms of reference. From this several more executive positions will be created. Once these new terms of reference are accepted the chapter will hold an election for all positions.

3. Chapter Events

OCFMA holds its annual PD and AGM session each June. This past year's event was hosted virtually on June 8th by Le Cite College in Ottawa. Topics included "Back To Campus" Strategies, Solar Installations from an Insurance Perspective, Space Planning For The New Curriculum Delivery and a round table discussion of various topics. We continue our bi-monthly meetings virtually and plan to begin in person at our October meeting.

4. Membership

The majority of Colleges renewed their membership for 22/23. A few had to be contacted. Part of the reason some were not renewed is that there is a large turnover of Facilities department leaders at the Colleges and the renewal doesn't get to the right person. When it does some are unaware of APPA/ERAPPA because they come from other sectors. We will make it a point in coming years to

educate new leaders and advocate for membership in APPA/ERAPPA. Because the Colleges and Universities in Ontario are government funded was are unable to have business partners.

5. Scholarships

Scholarships is not something OCFMA currently does but I will bring this idea up to the executive to see if there is any interest.

6. Initiatives

Our T&C committee is very engaged and continue to provide better ways to collaborate and share ideas and best practices. Completing our Terms of Reference and conduct a full election this fall. The additional executive members will provide a better cross section of Colleges rather than having just a few make decisions for the chapter.

7. Areas of Concern

One of our biggest challenges is filling executive and sub-committee chair positions. This is in part due to the turnover of Facilities leaders in our sector but also reflective of the workload these leaders bear at their institutions.

8. Finances

All members pay annual dues to the chapter. Fortunately collecting dues has never been an issue so the chapter is in good shape financially. The dues collected allows us to arrange and pay for sector PD sessions, speakers, hire consultants, upgrade software/technologies etc.

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 Development	Patricia Whitney	Framingham State University
Prof. Development	Melissa Bergeron	UMass, Amherst
Member & Comm. Eng.	Glen Mathieu	University of Connecticut
Technology & Comm.	Peyton Gibson	University of Rhode Island

2. Chapter Governance

Bylaws are currently under review for potential revisions and two items were identified. Most notably, our chapter bylaws will be updated to officially recognize the business partner rep. The proposed changes will be sent to membership and voted on at our November 2022 meeting

Board meetings were held monthly via zoom. Annual elections were held in person at our June 2022 meeting in Quinnipiac University.

3. Chapter Meetings 2022

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, two in person meetings were scheduled but had to be cancelled due to COVID-19. Our summer meeting was held in person at Quinnipiac University on June 15, 2022. Our

program was 2 educational sessions focused on diversity, equity and inclusion as well as reengaging staff after Covid. We also held a roundtable discussion about supply chain issues. Attendance was down from our regular meetings, however we expected that as this was our first meeting since Covid. We are working on a great program for our November meeting to get attendance back up. Two “Brown Bag Lunches” were held virtually this year to try and keep membership engaged. Attendance was about half of what we would get at an in person meeting.

4. Upcoming Chapter Events

SNEAPPA’s Fall Meeting is scheduled for Nov 3, 2022 at the International Tennis Hall of Fame in Newport Rhode Island.

March 2023 Meeting will be held at UMASS Worcester School of Medicine

June 2023 meeting will be held at Massachusetts Maritime Academy.

5. Membership

We continue to reach out to our constituency in an effort to provide educational programs that are relevant to our everyday professional responsibilities. Our attendance has been down, but we are hopeful for a return to regular conference attendance numbers at our November 2022 meeting.

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 \$75-\$100/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. We also started a business partner sponsorship program. This program allows our business partners to connect in additional ways with our educational partners. We added this sponsorship program 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. This year we added a business partner position description and are also working on adding the position to our bylaws. As mentioned above we also added a sponsorship program. The sponsorship opportunities are:

Main Conference Sponsor: \$1200

Breakfast Sponsor: \$600

Lunch Sponsor: \$600

Registration Area Sponsor: \$600

Campus Tour Sponsor: \$300